DOCUMENT RESUME

ED 185 732 EC 123 571

AUTHOR Proger, Barton B.
TITLE Toward the Growth of an Integrated Set of Management Information Systems, with Special Emphasis on Short-Range Planning, Long-Range Planning, and Program Evaluation.
PUB DATE Sep 79
NOTE 114p.; Composite Report of Highlights from the Eleven Separate Program Evaluation and Planning Committees of Spring, 1979.

EDRS PRICE MF01/PC05 Plus Postage.
DESCRIPTORS Data Collection; *Disabilities; Educational Administration; *Educational Planning; Elementary Secondary Education; *Gifted; *Long Range Planning; Needs Assessment; *Problem Solving; *Program Development; *Program Evaluation; Special Education; Statewide Planning
IDENTIFIERS Pennsylvania

ABSTRACT

Highlights of the findings of eleven program evaluation and planning committees within the division of special education in Pennsylvania and options in the future implementation of each program area are summarized. The committee had the following purposes: (1) to revise the structure of long range and short range planning within the division of special education (DSE), (2) to revise the structure of evaluation within the DSE, and (3) to develop mechanisms for refining (1) and (2). Committees were designed to devise a set of processes to solve specific problems through examination of the general planning process, the specific needs assessment procedures, outside planning inputs, and child oriented data concerns. The major portion of the document contains appended material on such topics as the short range planning model for the physically handicapped, district needs assessment recommendations from the classroom hearing impaired program, guidelines for outside program evaluation consultants from the itinerant hearing impaired program, and an example of programwide student performance data collection from the gifted program. (PHR)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

ED185732

TOWARD THE GROWTH OF AN INTEGRATED SET OF MANAGEMENT INFORMATION SYSTEMS, WITH SPECIAL EMPHASIS ON SHORT-RANGE PLANNING, LONG-RANGE PLANNING, AND PROGRAM EVALUATION

Barton B. Proger

Composite Report of Highlights from the Eleven Separate Program Evaluation and Planning Committees of Spring, 1979

September, 1979

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

B. Proger

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EC 123571

INTRODUCTION

From March through June, 1979, eleven "Program Evaluation and Planning Committees" operated in parallel but independent fashion. Each Committee dealt with the same basic outline of topics in the hope that they would come up with truly original and uninfluenced views of what might be the most appropriate recommendations to put forward for the Division of Special Education Administrative Staff to consider. The purpose of the present Composite Report is to summarize highlights of these efforts and to indicate what the many options are in the future implementation of each area. It should be noted that individual Committee Reports are also available, but that this Composite Report only extracts relevant excerpts.

This Composite Report includes (a) a brief description of the general nature of the Committees' work; (b) a general framework to describe present levels of planning, decision making, and evaluation within the Intermediate Unit; (c) possible problem areas in (b); (d) options for addressing (c); and (e) my suggestions for carrying forward certain options and their associated timelines. Items (d) and (e) will be organized by the four main topical areas of the Committees' work, namely, general planning process models for short-range planning (SRP) and long-range planning; specific needs assessment techniques; outside planning and evaluation inputs; and formal child-oriented data topics.

BRIEF DESCRIPTION OF THE WORK OF THE ELEVEN PROGRAM EVALUATION AND PLANNING COMMITTEES WITHIN THE DIVISION OF SPECIAL EDUCATION

The purposes of each Committee were (1) to revise the structure of long-range and short-range planning within the Division of Special Education (DSE); (2) to revise the structure of program evaluation within the DSE; and (3) to develop mechanisms for periodically refining (1) and (2). The Committee Members understood that their ideas were being offered in an advisory fashion, and that further intensive analysis of the ideas would have to occur, both for the program in question and across all programs as a whole, by Dr. Banks, the Special Education Council, and me. Within this understanding, each Committee devoted its efforts to systematically examining each of four main topics: (1) a general planning process; (2) specific needs assessment procedures; (3) outside planning inputs; and (4) child-oriented data concerns. It should be noted that it was not the intention of these Committees to try to analyze and solve specific problems, but instead to restrict itself to designing a general set of processes to do this very thing.

It was the intention for each Committee to address several subtopics within each of these four broad areas. Under the general planning process topic, the Committee Members were told to consider procedures that would be uniform across all programs within DSE; that would occur on an annual basis at least; that would involve all levels of staff members; that would be linked to the annual budget process within DSE; that would be linked to practical decision-making; that would be easily managed; and that would provide a systematic structure of topics to elicit staff input on.

With regard to the second topic of specific needs assessment procedures, the purpose was to generate techniques that could be used to hone in on highly specific areas identified in the general planning process. In effect, the needs assessment topic would be a second level of planning to act as a follow-up to the first level above.

The third topic of outside planning inputs would include planning information and ideas brought into a program by expert consultants, research by staff members on state-of-the-art in certain areas, visits to non-IU programs by selected members of the program, visits to other IU programs by staff members of the program in question, and attendance at conventions and technical seminars.

The fourth topic of child-oriented data included the subtopics of standardized tests, criterion-referenced tests, teacher-made tests, group-administered tests, individually administered tests, intake evaluations, progress measurement, the mechanical procedures of testing (who, how, what, how often, etc.), standards or criteria for growth, match of testing and monitoring with curriculum and objectives, progress reporting, and linking testing with Individual Educational Program Plans (IEPs).

The basic philosophy used in carrying out this Committee work was that all levels of staff within DSE should have formal, clearly defined ways of offering planning and program evaluation input into a specific program's operations, into general DSE operations, and into the IU as a whole. One can consider this advisory type input as a form of collaborative or participatory planning, and the principles are fairly well established in several models of program evaluation and planning. The basic philosophy is one of allowing the collective commonsense of all levels of staff to come to bear on problems of mutual concern.

The approach taken in carrying each Committee forward was to avoid bringing to the Members preconceived notions and models of what "sound" planning and program evaluation activities should look like. Instead, the Committee Members were encouraged to use their own preferences for implementing any of the four main topics mentioned above. Each Committee--even at the expense of redundancy--was asked to treat the four topics anew, without knowing what other Committees had said about the very same topics or what the formal literature said. It was felt that it was far more important of allowing each exceptionality to shape its planning and program evaluation frameworks into a customized fabric of ideas.

The goal of each Committee has been to address the above purposes, philosophy, and approach, in such a way as to produce an overall framework within which program evaluation and planning can be pursued for years to come, as each program sees fit to further elaborate upon. Within this framework, each of the four main topics has a definite place, related to the others and yet standing by itself if need be. In this regard, I think the efforts of each Committee were successful, and I sincerely thank each of the Members for their time and patience.

PRESENT LEVELS OF PLANNING, DECISION MAKING, AND EVALUATION WITHIN THE INTERMEDIATE UNIT

There appear to be at least four levels of planning, decision making, and evaluation within the Intermediate Unit that have direct bearing on this Composite Report's focus on the Division of Special Education: (a) Central Administration Level, (b) Administrative/Supervisory Divisional Staff, (c) Program Level, and (d) Individual Level. To provide a framework in which to view all of the discussion of this Composite Report, each of these levels is presented in Figures 1 through 4, respectively. Each of the Figures shows four major components to the decision making process: (a) planning inputs (what will be referred to as Management Information Systems, or MISs, in later parts of this Report); (b) the decision makers; (c) the types of decisions made; and (d) the evaluation of the implementation of those decisions.

FIGURE 1

CURRENT PLANNING/DECISION MAKING/PROGRAM EVALUATION PROCEDURES
AT THE CENTRAL ADMINISTRATION LEVEL (LEVEL I)

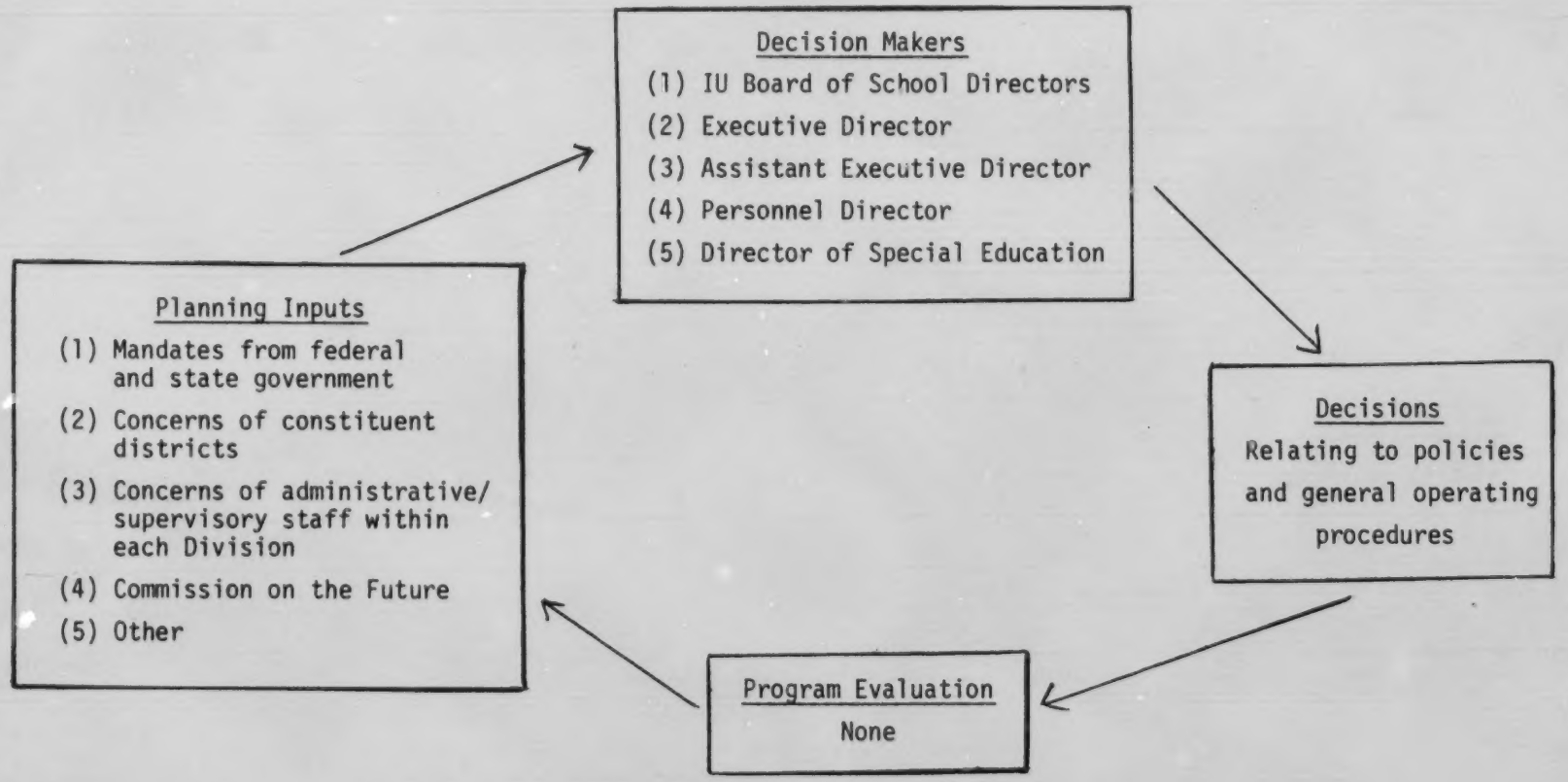

Decision Makers
(1) IU Board of School Directors
(2) Executive Director
(3) Assistant Executive Director
(4) Personnel Director
(5) Director of Special Education
Decisions
Relating to policies and general operating procedures
Program Evaluation
None
Planning Inputs
(1) Mandates from federal and state government
(2) Concerns of constituent districts
(3) Concerns of administrative/ supervisory staff within each Division
(4) Commission on the Future
(5) Other

FIGURE 2

CURRENT PLANNING/DECISION MAKING/PROGRAM EVALUATION PROCEDURES
AT THE DIVISION OF SPECIAL EDUCATION LEVEL
ACROSS ALL SPECIAL EDUCATION PROGRAMS (LEVEL II)

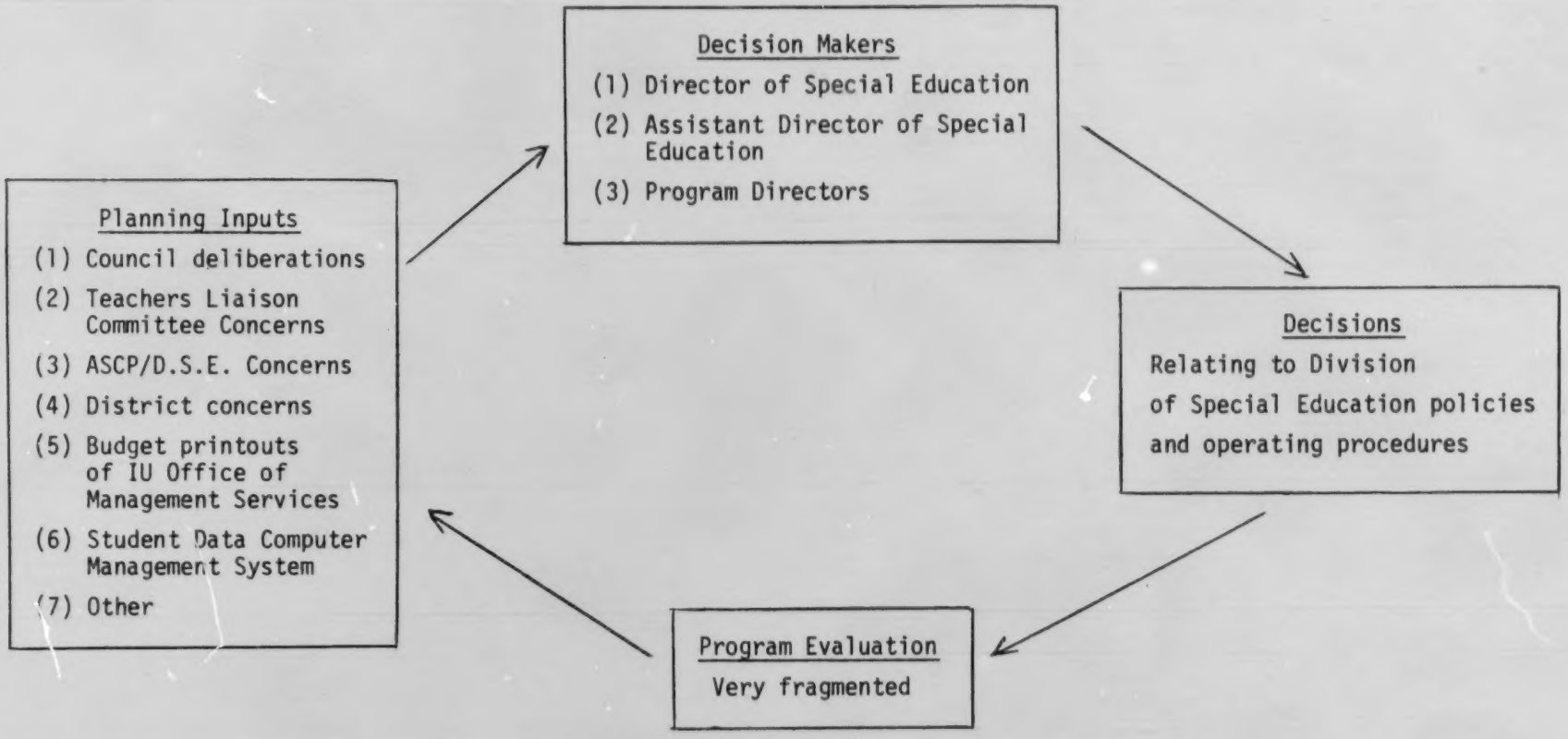

Decision Makers
(1) Director of Special Education
(2) Assistant Director of Special Education
(3) Program Directors
Decisions
Relating to Division of Special Education policies and operating procedures
Program Evaluation
Very fragmented
Planning Inputs
(1) Council deliberations
(2) Teachers Liaison Committee Concerns
(3) ASCP/D.S.E. Concerns
(4) District concerns
(5) Budget printouts of IU Office of Management Services
(6) Student Data Computer Management System
(7) Other

FIGURE 3

CURRENT PLANNING/DECISION MAKING/PROGRAM EVALUATION PROCEDURES
AT THE PROGRAM LEVEL WITHIN THE DIVISION OF SPECIAL EDUCATION (LEVEL III)

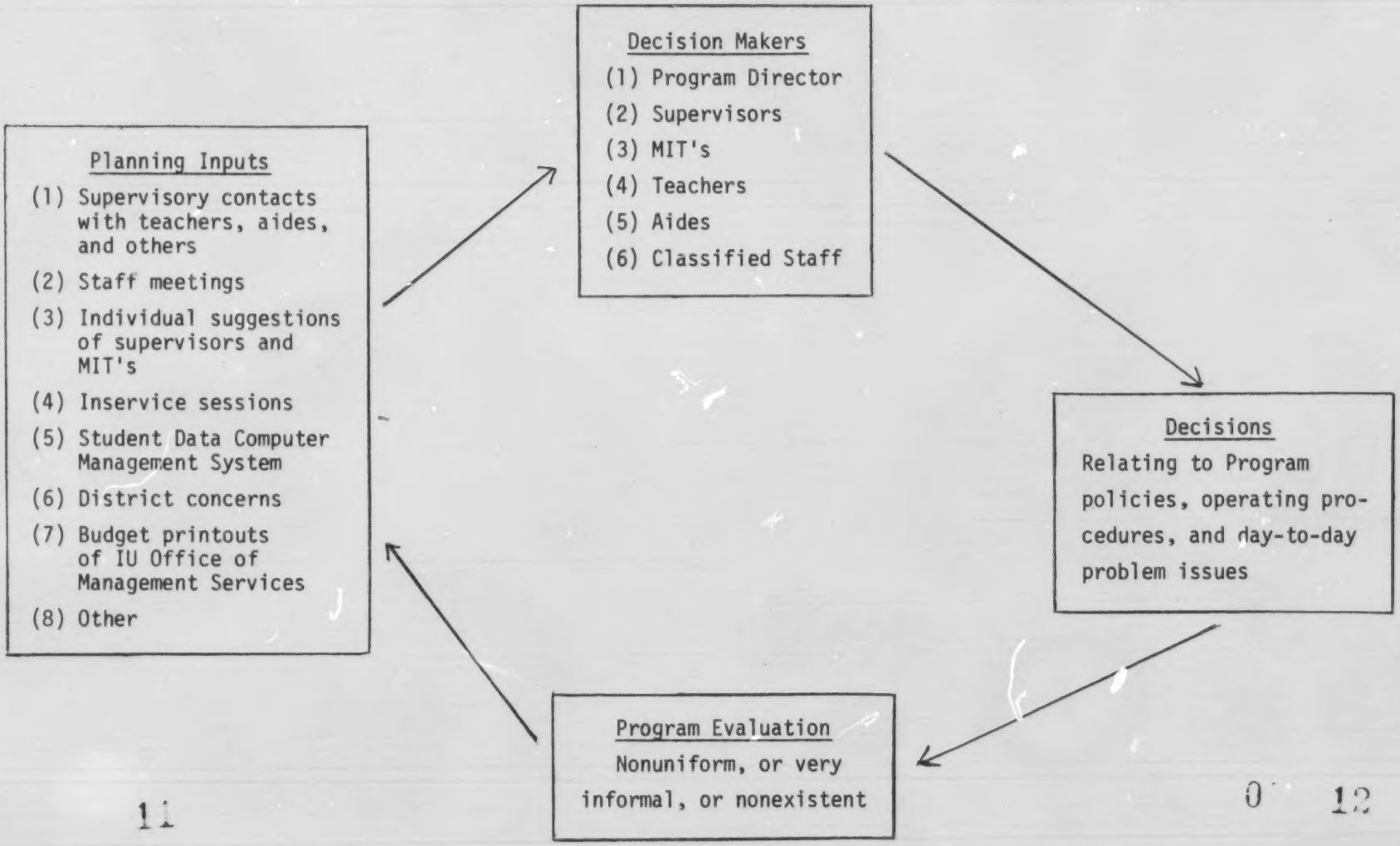
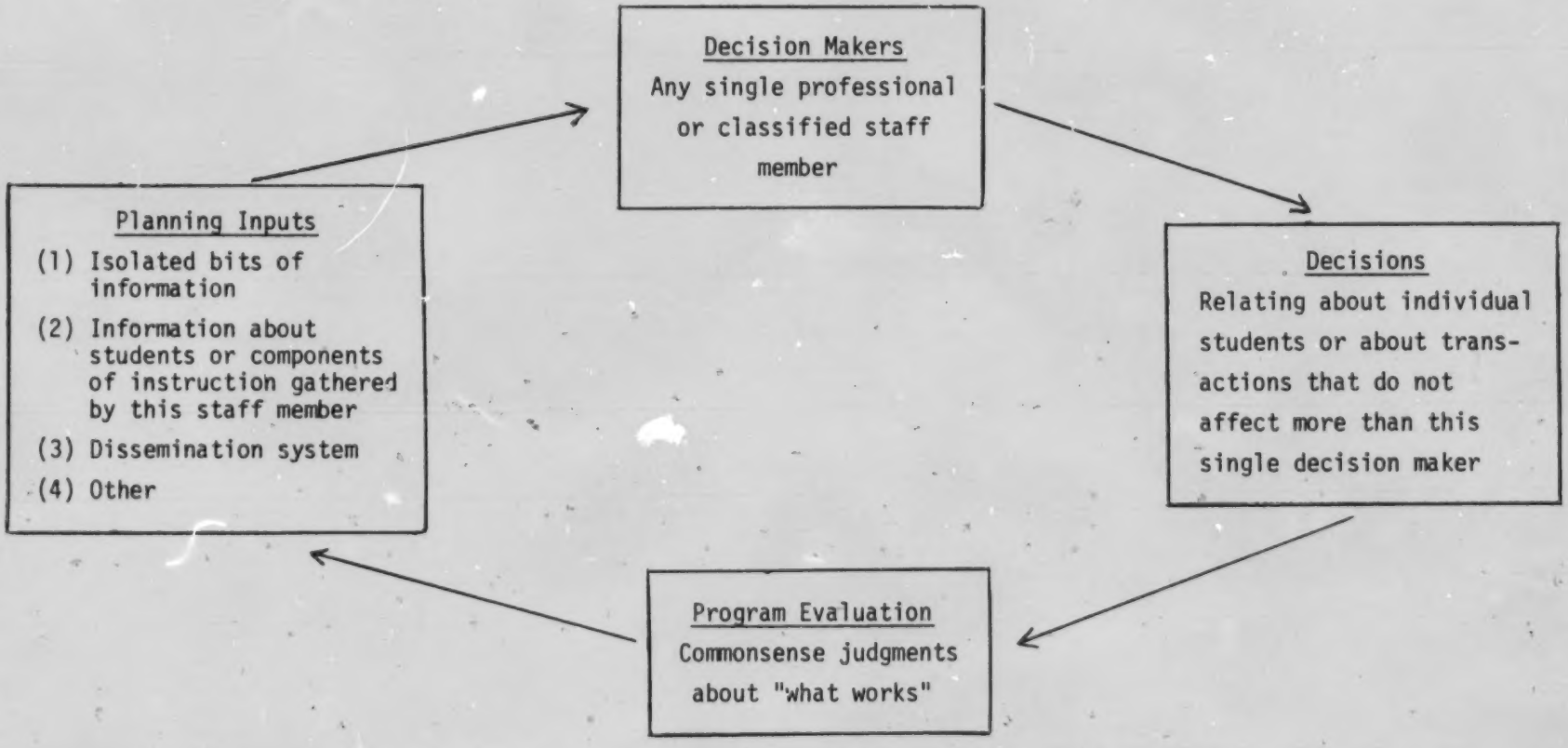


FIGURE 4

CURRENT PLANNING/DECISION MAKING/PROGRAM EVALUATION PROCEDURES
AT THE INDIVIDUAL STUDENT LEVEL (LEVEL IV)


Decision Makers
Any single professional or classified staff member
Decisions
Relating about individual students or about transactions that do not affect more than this single decision maker
Program Evaluation
Commonsense judgments about "what works"
Planning Inputs
(1) Isolated bits of information
(2) Information about students or components of instruction gathered by this staff member
(3) Dissemination system
(4) Other

POSSIBLE AREAS FOR IMPROVEMENT IN THE LEVELS OF PLANNING/ DECISION MAKING/ EVALUATION STRUCTURES

Before discussing possible problem areas in Figures 1 through 4 presented earlier, it is important to recognize the limits of the present analysis, constraints on the planning/decision making/evaluation cycles, and the premises upon which rest any options for change put forward in this Composite Report.

Limits of This Analysis: The following limits are put forth:

(1) The focus is primarily upon the planning or MIS implications of Figures 2 and 3;

(2) The roles of the decision makers and the associated decision making process are not being affected;

(3) The categories of, and nature of, decisions made in Figures 2 and 3 are not under study;

(4) Apart from (1), the only other areas of Figures 2 and 3 possibly affected are the program evaluation components.

Constraints Upon Any Participants in the Planning Processes: The following constraints, among others, must be dealt with:

(1) Unlike geographically centralized school district staff located within reasonably restricted territory of the district and especially a district building, IU staff of any Program are distributed over a very large region and not easily brought together timewise or location-wise;

(2) IU staff are subject to different sources of policy and procedural pressures other than just the IU itself;

(3) Opportunities for group meetings among IU staff are extremely limited or virtually nonexistent.

Premises Upon Which Committees' Work Rests: The following assumptions about the planning/decision making/evaluation cycles were made:

(1) Decisions are made at all levels of staff within the IU, about topics of varying levels of importance;

(2) Many different types of MIS/planning information inputs are currently in use and should be continued;

(3) Any planning input data that would result from the implementation of any new planning mechanisms contained in this Composite Report would be strictly advisory to the decision makers, with the latter maintaining full authority for how decisions are made;

(4) Short-range planning (SRP) and long-range (LRP) should take into account as many different sources of input as possible.

Possible Areas of Improvement: The following possible problems appear to be present in Figures 2 and 3:

(1) There is a lack of an integrated perspective upon all current and future MISs for both SRP and LRP so as to allow continuous planning for planning;

(2) SRP of an annual type concentrates upon financial details, such as numbers of classes, amounts of supplies, and so on, and generally does not attend to process-or procedure-oriented topics that should be periodically re-examined;

(3) SRP often does not make optimum use of the high degree of creativity present in all levels of staff, including both classified and professional staff;

(4) LRP of a continuing nature is virtually nonexistent;

(5) The outcomes (recommendations) of the many existing SRP mechanisms are usually not integrated and thus operate in a fragmented fashion;

(6) Uniformity of procedures for SRP and LRP does not exist.

(7) There is at present no common framework for program evaluation options to be viewed within;

(8) Non-student-data program evaluation procedures (e.g., use of outside consultants) have no uniformity across Programs in the Division of Special Education;

(9) Student data collection program evaluation procedures are not currently appropriate to the objectives of the various Programs and are in need of updating (that is, new tests must be selected for program evaluation purposes);

(10) Program evaluation procedures are not currently linked to SRP and LRP.

ALTERNATIVES FOR ADDRESSING PROBLEM AREAS

The major purpose of this Composite Report on Program Evaluation and Planning is to stimulate thinking on how existing procedures can be augmented and made somewhat more uniform. At the present time, this Report attempts to establish a broader perspective for all current and possible future MISs (or planning mechanisms and information input methods) so that growth and ongoing refinement of these MISs can occur in a coordinated fashion. From the perspective put forward in Figures 1 through 4, the following formal and informal MISs are currently in use and will no doubt continue:

(MIS-1): Federal laws and regulations;

(MIS-2): State laws and standards;

(MIS-3): IU policies and procedures;

(MIS-4): Local district needs and concerns;

(MIS-5): IU students' parents' needs and concerns;

(MIS-6): Human service agency concerns;

(MIS-7): Business and industry concerns;

(MIS-8): General community concerns;

(MIS-9): Goals and objectives of IU;

(MIS-10): Goals and objectives of Programs with Division of Special Education;

(MIS-11): Goals and objectives of Individual Staff Members within each Program;

(MIS-12): Special Education Council deliberations;

(MIS-13): Teachers' Liaison Group inputs;

(MIS-14): ASCP (Administrative, Supervisory, Consultative, and Psychological) Staff inputs;

(MIS-15): Inputs from periodic Program staff meetings;

(MIS-16): Suggestions from Inservice Session (or Course) Participants;

(MIS-17): Routine supervisory contacts with teachers and aides;

(MIS-18): Formal advisory group inputs;

(MIS-19): Student Data Computer Management System;

(MIS-20): Central Office of Management Systems Computer Budget System;

(MIS-21): Manual child accounting systems;

(MIS-22): Manual budget information systems;

(MIS-23): Manual Program statistical nonstudent data systems;

(MIS-24): Other current MISs.

It will be noted that MIS-19 through MIS-23 are the more traditional, rather formalized, and visible MISs, but that MIS-1 through MIS-18 also are aspects of planning inputs and thus can be considered MISs themselves, even if in a looser, less formal manner. Besides conceiving of the above list of MISs as comprising the current components of planning input within the Division of Special Education, the following additional MISs should be recognized and given a place in the future growth of MISs within the Division:

(MIS-25): Projections of alternative futures in Program operations;

(MIS-26): Student enrollment projections;

(MIS-27): Staff employment projections;

(MIS-28): Budget projections for alternative futures of Programs;

(MIS-29): Demographic statistics about staff;

(MIS-30): Density distributions of students throughout the County by various traits;

(MIS-31): Formal SRP staff inputs from all levels of staff;

(MIS-32): Formal LRP staff inputs from all levels of staff;

(MIS-33): Other future MISs.

What must be recognized here is that MIS-1 through MIS-24 currently exist and are in use at various times throughout the school year, even though no single staff member at any level of the Division is usually even aware of more than a few MISs at a time. Thus, coordination is truly a problem, as mentioned earlier. With regard to MIS-25 through MIS-33, as well as the earlier 24 MISs, this Composite Report is recommending a starting point in attacking the coordination problem by focusing on LRP and SRP procedures that allow a common foundation of planning, namely, MIS-31 and MIS-32. This Report now turns to several alternatives to stimulate Division thinking in these areas.

Alternatives For SRP: Of the eleven parallel Program Evaluation and Planning Committees meeting in spring, 1979, nine contained frameworks for a general planning process model of SRP type. The nine Committees were (1) Gifted; (2) Vision; (3) Physically Handicapped; (4) Educable Mentally Retarded; (5) Classroom Hearing Impaired; (6) Learning and Adjustment; (7) Itinerant Hearing Impaired; (8) Severely/Profoundly Mentally Retarded; and (9) Learning Disabilities. The other two Committees (Speech and Language; Trainable Mentally Retarded) placed their priorities in other topical areas and did not address

this SRP topic in any concentrated fashion. For those interested in the nine existing alternatives to the SRP area, the separate Committee Reports are available. However, in the interest of having this Composite Report focus upon the truly different variations on SRP, excerpts from the separate Reports are provided. Appendix A contains a version of how a total-staff-involvement planning process operates throughout the entire school year, with ample time to link to the annual budget decision making process the second half of the school year. This example, from the Physically Handicapped Program, demonstrates one alternative for how personal interaction meetings of problem-solving type can be combined with paper-and-pencil techniques to allow several opportunities for staff input. (Other well-thought-out versions of this extensive combination approach of meetings and written input were given by the Classroom Hearing Impaired Progrem, the Itinerant Hearing Impaired Program, the Severely/Profoundly Mentally Retarded Program, and the Gifted Program.)

A second example of SRP is given in Appendix B and is one that emphasizes primarily problem-solving staff meetings rather than written idea collection. This example, from the Educable Mentally Retarded Program, contains a series of ongoing meetings to lead to concentrated thought on selected topics. (The Learning Disabilities Program also had a variation of this type.)

A third example of SRP is given in Appendix C and consists of a topic-of-the-month suggestion box. This alternative, from the Learning and Adjustment Program, involves a representative committee structure to seek out solutions and/or suggested alternatives to given areas of concern, focusing only on one topic at a time.

A fourth example, contained in Appendix D, illustrates a variation of a single-timepoint-data-collection technique. This approach, from the Vision Program, is strictly written in nature and tries to minimize the amount of meetings and other types of work needed to process the suggestions. (The Gifted Program and Learning Disabilities Program also contained variations of this type.)

In pointing out the above four examples, this Composite Report is only attempting to show four different, well-thought-out variations on this single theme of a formal process of total staff involvement for SRP. Many other options are possible, but clearly the range of ideas represented here are what many different staff felt would be realistic ways of addressing SRP. However, to guarantee that as many different variations of SRP are considered before the key decision makers would attempt to implement any single version of formalized SRP, there appear to be six crucial areas of variables relating to any SRP variation: (a) method of gathering SRP input; (b) method of collating and summarizing SRP input; (c) method of linking SRP staff input with decision makers; (d) feedback to staff on what happended to SRP input; (e) timing of SRP idea collection; and (f) timing of staff SRP data to decision makers. Apart from the variations on these six topics represented in the above four, selected examples, Table 1 contains several alternatives for each of the six crucial decision topics. Decisions about Table 1 will have to be made before any SRP model can be implemented.

TABLE 1

CRUCIAL DECISION POINT OPTIONS
COMMON TO ALL VARIATIONS OF
UNIFORM SHORT-RANGE PLANNING (SRP)
PROCESSES UNDER CONSIDERATION

1. Method of Gathering SRP Input

   a. Paper-and-pencil forms
   b. Meetings of all staff members
   c. Small, representative staff committees

2. Method of Collating and Summarizing SRP Input

   a. Meeting of entire staff of a program
   b. Small, representative committee
   c. By Program Director and/or Supervisors and/or Master Itinerant Teachers
   d. Going across all Programs by any combination of a, b, or c (rather than just within a Program)

3. Method of Linking SRP Staff Input With Decision Makers

   a. Handing over recommendations in writing to decision makers
   b. Meeting with collation committee and decision makers to explain recommendations and then to hand over report in writing to decision makers
   c. Meeting of decision makers with whole staff to discuss recommendations and then to hand over report in writing to decision makers

4. Feedback to Staff On What Happened to SRP Input

   a. Staff told to wait and see if anything happens
   b. Brief update note from decision makers to all staff
   c. Explanation by decision makers in writing to staff of what will, and will not, be done
   d. Meeting between decision makers and all staff to discuss what will, and will not, be done
   e. Meeting between decision makers and staff collation committee to discuss what will, and will not, be done

5. Timing of SRP Idea Collection

   a. Once a year
   b. Key milestones (2 to 4 times a year)
   c. Ongoing throughout year

6. Timing of Providing Staff SRP Recommendations to Decision Makers

   a. Once a year
   b. Key milestones (2 to 4 times a year)
   c. Ongoing throughout year

Alternatives for LRP: While the primary mission of all eleven Program Evaluation and Planning Committees was to focus on SRP, the topic of LRP was also addressed in their discussions. This area, nonexistent in our Division at present, needs a great deal of work in arriving at a suitable beginning mechanism. However, a few options were offered by the Committees. Excerpts are contained in Appendices E, F, and G on LRP from the Reports of the Committees for the Physically Handicapped Program, the Severely/Profoundly Mentally Retarded Program, and the Educable Mentally Retarded Program, respectively. More will be said about steps toward achieving LRP later in this Composite Report.

Alternatives for Specific Needs Assessment Techniques: Originally, this topic was meant to be generic in nature and not be restricted to any particular content area focus or respondent group. However, Dr. Banks felt methods were required of assessing the needs of district staff on how the IU Division of Special Education was to grow in the future. Thus, the eleven Committees then restricted themselves to the latter variety of specific needs assessment. Out of the eleven Program Evaluation and Planning Committees, most considered paper-and-pencil variations of needs assessment of district concerns. However, the Learning and Adjustment Program had severe reservations about the paper-and-pencil approach and instead felt a more personal, informal interactive approach was called for in their own case, as well as in certain other programs. Appendix H contains these recommendations. Examples of regular paper-and-pencil needs assessment are given in Appendices I and J for the Speech and Language Program and the Classroom Hearing Impaired Program, respectively. Finally, an example of a combination of paper-and-pencil instrument, followed up by selected interviews, is given in the case of the Learning Disabilities Program in Appendix K. The reader might also wish to consult the separate Committee Reports for the Itinerant Hearing Impaired Program and the Severely/Profoundly Mentally Retarded Program.

Apart from the Committees' concerns about the methods of collecting such district needs assessment information, the Committees also felt for the most part that IU staff input of a formal type be initiated (SRP) before the Division begins to consider nonstaff outside input in a systematic manner.

Alternatives for Outside Planning and Program Evaluation Inputs: Generally, the Committees felt that not only should IU staff concerns be used in SRP as the main foundation of a formalized annual planning and evaluation system, but also that several other options of "outside" planning inputs also be considered. The general framework for viewing this aspect of planning and evaluation can be listed as follows:

1. expert consultants;
2. research by staff members on state-of-the-art in program areas;
3. visits to non-IU programs by selected members of an IU program;
4. visits to other IU programs by staff members of the program under consideration;
5. attendance at conventions;
6. attendance at seminars and courses;
7. peer evaluation of one IU staff member's programmatic activities by other members of that program.

In this Report up to this Section on "Outside" inputs, the topics have all dealt with activities that could be classified as primarily planning in nature and could even be termed MISs, if one held a broad orientation to the subtopics involved. However, this present Section on "Outside" inputs has a dual nature of both planning usage of data, as well as evaluation usage. For instance, of the seven outside inputs listed above, the first one of expert consultants can be viewed as more of an objective program evaluation activity than a planning effort per se, although in the latter sense it also has bearings on LRP. Options 3 and 7 also would seem to have primarily program evaluation/ comparative aspects, while Options 2, 4, 5, and 6 appear to be more of a planning nature. Regardless of these distinctions, all of these options are in current use by various IU Programs, but the Committees' basic feeling was that more structure was needed to each of these options to produce as much uniformity as possible so that any individual knows what he is considering whenever a Program wishes to defend changes based upon the results of following one of these outside inputs. Thus, the Committees addressed themselves to trying to put forward some types of guidelines for these areas.

Appendix L contains an example of a very thorough analysis of recommendations for guidelines for Option 1, outside consultants. This example, from the Itinerant Hearing Impaired Program, represents what easily could be made into a brief but comprehensive manual for the use of outside program evaluation consultants. Other Committee Reports had somewhat similar guidelines and could be consulted also. It should be noted that both the Committees for the Educable Mentally Retarded and for the Gifted felt outside consultants were of limited value for program evaluation and planning purposes. In addition, the Committee for the Gifted felt that consultants from outside the Commonwealth of Pennsylvania would have such a limited perspective on the context within which local educational agencies must operate, as to be of little value.

With regard to Options 2 through 7 for outside inputs listed earlier, the Committee for the Trainable Mentally Retarded outlined a number of guidelines, which are contained in Appendix M. The Committee for the Speech and Language Program also had a number of interesting reflections on these options, and their recommendations are contained in Appendix N.

Alternatives for Formal Child-Oriented Data Topics: The emphasis in this area was to examine some aspects of formal program evaluation in terms of the "hard" data of formal measurement devices for assessing student progress. Also, the related topics of progress reports and report cards were discussed. This set of topics still needs much more work, and only representative highlights are presented here. Typical of the type of efforts attempted here are the efforts of the Committees for the Gifted Program (Appendix O) and for the Vision Program (Appendix P).

SUGGESTIONS FOR IMPLEMENTING ANY PLANNING AND PROGRAM EVALUATION OPTIONS

As mentioned earlier in this Composite Report, its purpose was to present a number of options for planning and program evaluation procedures that could augment already existing systems and hopefully add to an already excellent agency. Decisions must be made on the many ideas presented within this Report. Of particular importance are SRP and LRP. Some suggested procedures and timelines are presented in Table 2. Hopefully, these activities will all be team efforts to carry something forward in actuality, just as the many separate Committee Members provided their recommendations on all these topics during spring, 1979.

TABLE 2

IMPLEMENTATION PLAN FOR CARRYING OUT FURTHER WORK ON PROGRAM EVALUATION AND PLANNING OPTIONS

Topic	Steps	Timelines
1. SRP	a. Continue discussion in Council meetings (or special meetings of Council Members) to consider all options	a. Sept. and Oct., 1979
	b. Decide on one or two manageable options	b. Start of Nov. 1979
	c. Begin implementation	c. Mid-Nov. 1979 Onward
2. LRP	a. Create design committee to devise LRP process	a. Dec. 1979
	b. Design committee meets to produce an appropriate process	b. Dec. 1979 through Jan. 1980
	c. Committee submits plan to Director of Special Education and to Council	c. Feb. 1980
	d. Council considers all options	d. Mar. to Apr. 1980
	e. Decision on LRP is made	e. Apr. 1980
	f. LRP is implemented	f. May 1980
3. District Needs Assessment	a. Delay formal data collection until well after SRP begins	a. Mid-year 1980-1981
	b. Continue informal district needs assessment through District Advisory Council	b. Ongoing already
4. Outside Planning and Program Evaluation Inputs	a. Finalize formal, written guidelines for use of outside expert program evaluation consultants	a. Dec. 1979
	b. Design plan of systematic, rotating implementation for outside consultants	b. Jan. 1980
	c. Implement total outside consultant design	c. Feb. 1980 Onward

	d. Finalize formal, uniform guidelines for all other options of "outside" inputs	d. Mar. 1980
	e. Implement plan of allowing all other options of "outside" inputs	e. Apr. 1980 Onward
5. Child-Oriented Data Topics	a. Select final set of uniform instruments to be used throughout each Program (specific to each Program)	a. Nov. 1979
	b. Determine plan for administration of instruments	b. Dec. 1979
	c. Implement revised program-wide program evaluation data collection	c. Spring 1980 Onward

POSTSCRIPT

Nowhere in this Composite Report will one find mention on certain standard administrative tools of planning, such as systems analysis, PPBS (planning, programming, budgeting systems), PERT (program evaluation and review technique), CPM (critical path method), Delphi techniques, and other similar technical approaches. The entire focus in this Report was to concentrate on the creative role that all levels of staff could play in an easily understood and easily managed MIS from which administration and staff could equally benefit. With additional work in this direction, some meaningful options will be able to be implemented by the Division of Special Education.

SELECTED REFERENCES FOR FURTHER WORK BY DIVISION OF SPECIAL EDUCATION IN AREAS OF SHORT-RANGE AND LONG-RANGE PLANNING MODELS AND MANAGEMENT INFORMATION SYSTEMS

Andrew, G. M.; Moir, R. E. Information-decision systems in education. Itasca, N.Y.: Peacock Publishers, 1970.

Armitage, P. M.; Smith, C. S.; & Alper, P. Decision models for educational planning. London: Penguin Books, 1969.

Benveniste, Guy. Consequences of excessive educational planning. Educational Planning, 1974, 1(2), 1-8. (Oct.)

Buchanan, Paul C. Organizational development as a process strategy for change. Educational Technology, 1972, 12, 10-14. (Oct.)

Chase, Richard B.; Clark, Donald C. Long range planning in school districts. Educational Technology, 1974, 14(10), 32-36. (Oct.)

Chirikos, T. N.; Wheeler, A. C. Concepts and techniques of educational planning. Review of Educational Research, 1968, 38, 264-276.

Correa, H. Quantitative methods of educational planning. Scranton: International Textbook Company, 1969.

Darby, Charles A., Jr.; et al. Program description and process guide for the program data analysis plan for Colorado special education. Silver Spring, MD: Scientific Educational Systems, Inc., 1972 (ERIC ED-074-648).

Halpern, Gerald. The MAPS way: Towards a computer-assisted management and planning system. Education Canada, 1971, 2(3), 47-55.

Hentschke, Guilbert C. Management operations in education. Berkeley, CA: McCutchan Publishing Corp., 1975.

Higginson, George M.; Love, Reese. Planning without peril: Long range planning for educational development. Educational Technology, 1973, 13(12), 22-28. (Dec.)

Johnston, Rudolph; McCollough, Thomas. Long-range participatory planning: Experience in the Palo Alto School District, California. Educational Planning, 1976, 2(3), 64-72. (Jan.)

Kaufman, Roger A. Educational system planning. Englewood Cliffs, N.J.: Prentice Hall, 1972.

Kinder, J. A. Decision making in public education. Austin, TX: MESA Publications, 1978.

Mann, Dale. Policy decision-making in education: An introduction to calculation and control. New York: Teachers College Press, 1975.

McDonnell, John F. The human element in decision making. Personnel Journal, 1974, 53(3), 188-190. (Mar.)

McNamara, James F. Mathematical programming models in educational planning. Review of Educational Research, 1971, 41(5), 419-446.

Schmuck, Richard; Blumberg, Arthur. Teacher participation in organizational decisions. NASSP Bulletin, 1969, 53(339), 89-105.

Schmuck, Richard A.; et al. Handbook of organization development in schools. Palo Alto, CA: National Press Books, 1972.

Temkin, S. An evaluation of comprehensive planning literature with an annotated bibliography. Philadelphia: Research for Better Schools, 1970.

Witkin, Belle Ruth. Management information systems: Applications to educational administration. Hayward, CA: Alameda County School Dept., 1971 (ERIC ED-057-608).

Wong, Penelope; Doyle, Michael; & Straus, David. Problem solving through "process management." Management Review, 1973, 62(11), 5-10. (Nov.)

APPENDIX A

SHORT-RANGE PLANNING MODEL FROM THE PHYSICALLY HANDICAPPED PROGRAM

MINUTES OF THE PROGRAM EVALUATION AND PLANNING COMMITTEE FOR THE PHYSICALLY HANDICAPPED

1. GENERAL PLANNING PROCESS

Figure 1 contains a schematic of this process. At both points 1 and 3, staff are asked for input according to a structured list of topics in questionnaire and/or discussion agenda format. Topics of concern for the physically handicapped program include:

(a) uniform procedures for ordering materials

(b) uniform procedures for prioritizing the inclusion and deletion of requested materials

(c) uniform ways of writing program descriptions for levels within a program

(d) movement across levels within a program

(e) short, concise, uniform way of providing the receiving IU teacher with intake information

(f) predicting the number of new intakes by June if not a transfer, and projection of transfers

(g) coordination of preschool movement into school-age IU programs

(h) concept of head teachers in a given locale, with designated duties

(i) supervisory consultation with individual staff members on teaching methods and other classroom activities

(j) uniform availability of MITs

(k) IEP process

(l) paperwork and data collection

(m) objective banks and usage of objectives

(n) curriculum development and revision

(o) early planning and coordination at school-age levels for post-21 activities

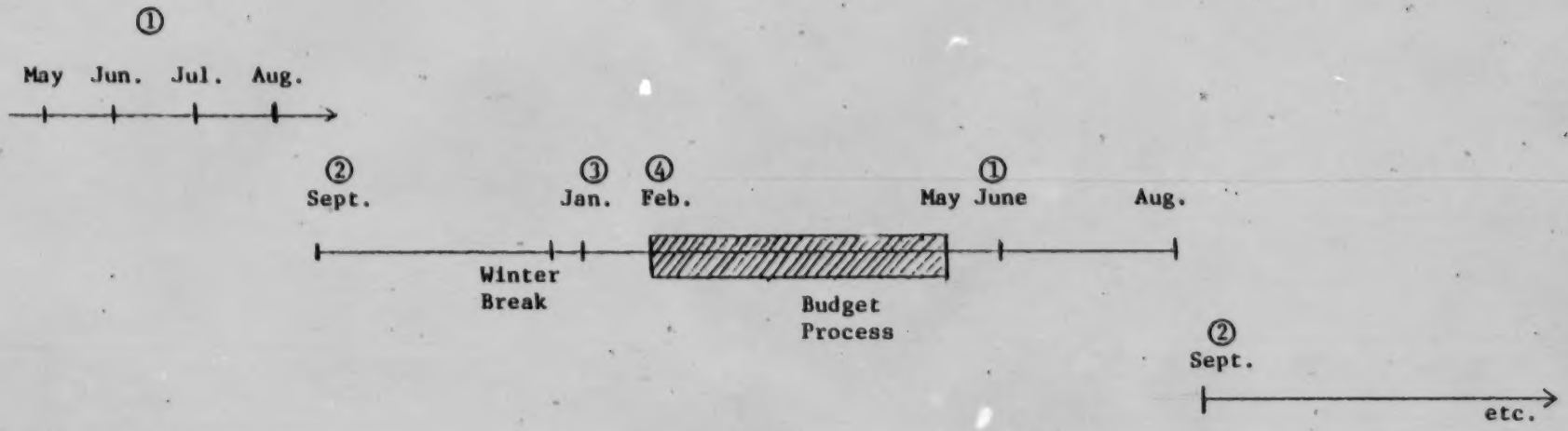
(p) vocational/job opportunities

(q) social integration

(r) uniform access to community resources

FIGURE 1

GENERAL PLANNING PROCESS MODEL FOR PHYSICALLY HANDICAPPED PROGRAM



Notes

① End-of-year, nonchildren days in June (about 1½ - 2 days) to allow staff planning work sessions.

② Feedback to staff at start-of-year programs inservice as to what changes will be made.

③ Gathering of additional ideas to change by questionnaire in preparation for budget process.

④ Program Director receives report from staff as to what changes are desired that may or may not affect budget process.

(s) communication within the IU, within and across programs: sharing ideas and events and knowledge of all IU programs and services

To elaborate on the physically handicapped general planning process model in Figure 1, one should bear in mind several points. Timepoint 1 in Figure 1 is central to the design. The Committee feels that the closeout at the end of the year often results in a lot of unproductive time in menial chores, which can be rapidly completed anyway and still have one to two days left over. These two days could be used to divide into small, manageable discussion groups (for instance, the 21 physically handicapped staff members could be divided into two roughly equi-sized groups). First, the groups as a whole could decide which topics from a list such as the above could be pursued and resolved within the available time· topics which did not meet this criterion would be deferred until later. The groups would first select a series of easy-to-manage, small-scale topics that definitely meet the criterion of potential closure, and then would also agree on a few of the knottier problem areas as well. At the end of the two-day discussion period, a few staff members would voluntarily agree to write up a brief report of whatever changes in programs operations they feel are appropriate and feasible. The changes in the report to the Program Director would be grouped into three areas: (1) changes which can be implemented almost immediately and do not require major budgetary changes: (2) slightly delayed changes which require budget changes but still are clearly feasible; and (3) delayed changes which require more planning to resolve.

The Program Director would have summer to consider these changes. At the start-of-year inservice sessions with only his own staff, he would give them closure in writing and verbally about what changes will be made.

At timepoint 3 in Figure 1, staff would again be surveyed for brief input on a printed form of topics (or in a staff meeting verbally) on any additional changes that seem appropriate. Input from the June report and the January survey would then be considered during the February-to-May budget process (timepoint 4), especially for those changes that required budgetary reallocations for the coming year.

The process would begin anew that following June. It should be noted that the June discussion meetings were considered to be feasible in any program. For example, in the large Learning and Adjustment Program, one can use as session leaders about four supervisors, eight MITs, and ten social workers, and still achieve discussion group sizes of about ten.

APPENDIX B

SHORT-RANGE PLANNING MODEL FROM THE EDUCABLE MENTALLY RETARDED PROGRAM

MINUTES OF THE PROGRAM EVALUATION AND PLANNING COMMITTEE FOR THE EDUCABLE MENTALLY RETARDED

1. GENERAL PLANNING PROCESS

The subtopics of this area, as mentioned above, were considered in great detail by the Program Evaluation Committee for the Educable Mentally Retarded Program. Of particular concern to them was the linkage of the process to major decision-making activities so that any work and effort placed into such a staff advisory planning process would result in visible changes and improvements.

Figure 1 contains the Committee's recommended general process planning model. The key features to this internal planning process model are the manner in which ideas for constructive change are generated, the timing of the process, the setting of planning priorities, planning recommendations, and the linkage with administrative decision-making. With regard to idea generation, the Committee recommends that a problem-solving approach be used in a group discussion setting, with an open, informal atmosphere prevailing. Rather than holding only one such meeting prior to the February through May budget process, it was decided to recommend a series of meetings to allow adequate intervening time periods for Program staff to digest the prioritized topics of discussion.

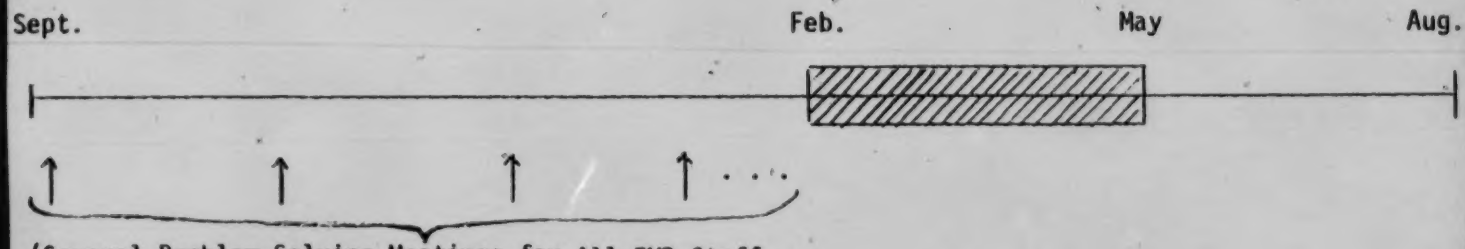
For timing, the Committee recommends beginning the problem-solving sessions at the opening-day inservice in September. Additional sessions would be held at later points between September and January of that school year, covering as many pressing problems as possible in a careful way, with closure of recommendations to the Program Director and Director of Special Education being the immediate goal of the meetings. The Committee recognizes that the series of staggered meetings would substitute for program staff, or some other calendar remedy would have to be sought. If scheduling of these sessions poses a severe problem across all staff, then an alternative timing recommendation of the Committee is to cluster staff according to districts which have the same inservice days.

With regard to the setting of planning priorities, the Committee recommends that a list of concerns be composed anew each year for all staff of the Program to consider in the problem-solving sessions. The Committee felt that the staff could determine priorities of what topics to focus on at the start-of-the-year inservice session, after the general session across all programs was completed in the morning. Each staff member would weight the topics as to degree of concern to them. Any staff members not present would get the same topical list sent to them. Wherever appropriate, the list of topics would provide brief definitions to avoid any ambiguity. Table 1 contains the Committee's recommended initial list of topics to begin the general planning process model.

The planning recommendations would be the outcome of the group discussion sessions. The report would be edited by the program supervisors from the ideas of the staff and would be submitted to the Program Director and Director of Special Education to achieve closure in the annual

FIGURE 1

GENERAL PLANNING PROCESS MODEL FOR STAFF INPUT, RECOMMENDED BY PROGRAM EVALUATION COMMITTEE FOR THE EDUCABLE MENTALLY RETARDED PROGRAM



(Several Problem-Solving Meetings for All EMR Staff, With Final Report to Program Director Prior to Feb.)

TABLE 1

LIST OF TOPICS FOR GENERAL PLANNING PROCESS MODEL RECOMMENDED BY THE PROGRAM EVALUATION COMMITTEE FOR THE EDUCABLE MENTALLY RETARDED PROGRAM

(a) Content of Long-Term Planning

(b) Uniformity of Procedures

(c) Uniformity of Responsibilities

(d) Uniformity of Resources (e.g., support staff)

(e) Communication Procedures (e.g., uniformity, inter-program, intra-program, I.U. to districts and other agencies)

(f) Inservice to I.U. Staff (e.g., quality, quantity, appropriate topics, release time, pay)

(g) Inservice to District Staff (e.g., district teachers as well as pupil personnel staff)

(h) Transportation (i.e., district-operated and I.U.-operated)

(i) Parenting (e.g., training of parents, staff inservice on how to do so)

(j) Recordkeeping (e.g., uniformity, nature of both manual and computer systems)

(k) Accountability and Liability of Staff (e.g., hearings)

(l) Mainstreaming (e.g., functional responsibilities of I.U. staff in this process, inservice of district staff on nature of special I.U. programs, children, etc.)

(m) I.E.P. Procedures

(n) Graduation (e.g., placement considerations, team approach)

(o) Referral Procedures (e.g., uniformity of district screening and evaluation procedures)

(p) Physical Facilities (e.g., effects upon appropriate integration, uniformity, proximity to needed services and resources)

(q) Curriculum (e.g., supervised work experience, vocational offerings in general)

(r) Political Pressures (e.g., pressures from districts or other agencies to change I.U. procedures, undue pressures to effect certain placements)

(s) Calendar (e.g., uniformity across vocational-technical school settings, uniformity across integrated class settings)

(t) Inappropriate Placements

(u) Progress Reporting (e.g., meaningful interpretations by and for parents, link to I.E.P., roles of narrative information/test information/"grades" information, link to other programs or placements that student transfers to)

(v) Role Definitions (e.g., I.U. demands vs. district desires)

budgeting process on the recommendations. Whenever the staff devised more than one option for addressing a problem, the report will indicate what the staff's preference is.

The Committee recommended that the linking of this general planning process with the key decision-making process be handled as follows. After the annual planning report has been given to the Program Director and the Director of Special Education (probably in mid-to-late January), those two individuals would decide which of the advisory suggestions could be made in the program's operations and would give closure to the staff on what changes are to be made.

APPENDIX C

SHORT-RANGE PLANNING MODEL FROM THE LEARNING AND ADJUSTMENT PROGRAM

MINUTES OF THE PROGRAM EVALUATION AND PLANNING COMMITTEE FOR THE LEARNING AND ADJUSTMENT PROGRAM

This Committee considered all of the topics that were mentioned earlier. The results of these Committee meetings will be presented in the following order: (1) General Planning Process Model; (2) Specific Needs Assessment Techniques; (3) Outside Planning Inputs; (4) Child-Oriented Data Topics.

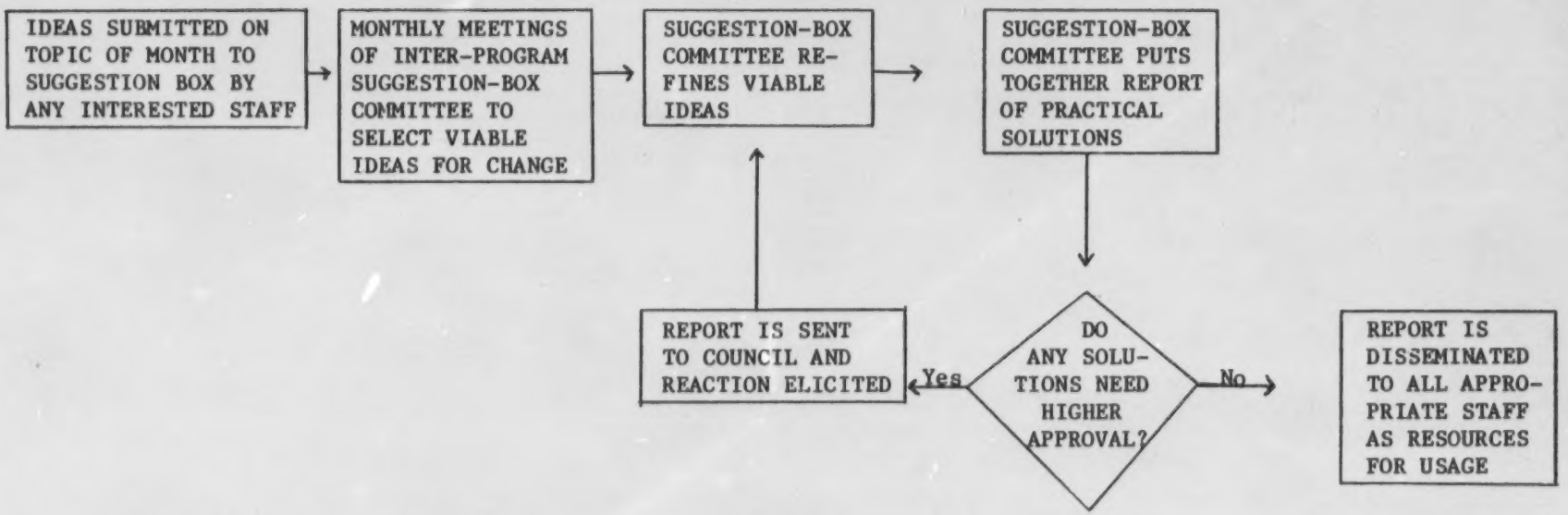
1. GENERAL PLANNING PROCESS

This Committee devised a rather unique mechanism for obtaining general planning input in an ongoing basis. The recommendations of this Committee are contained in Figure 1. The Committee devised what is in effect a "suggestion box" procedure. At first, the discussion was aimed at some type of annual survey of paper-and-pencil type. However, this Program feels that various types of more personal interactions are far more effective than any written documents can be. This perspective affected the approach taken by this Committee to many of the topics on the agenda for these program evaluation committees, with surprisingly innovative results. In the case of this particular topic of the general planning process model, the Committee felt that a written survey would be too perfunctory. Discussion centered on who would collate any such data accumulated, and who would take such ideas further to make any practical use out of them. In place of any written response mechanisms, this Committee devised the sequence of steps indicated in Figure 1. One aspect of this process is the appointment at the start of each school year of a Suggestion-Box Committee to represent all Programs. A possibility would be to have the Teachers Liaison Committee recommend appointments to such a special committee. There would be one member from each Program or department within the Division of Special Education.

The Suggestion-Box Committee would be responsible for selecting a major "topic of the month" area. An announcement of the topic would be sent out to all Division staff, perhaps through the personnel newsletter of Dr. Illuzzi. Any ideas or comments that the staff would wish to offer would be given to any member of the Suggestion-Box Committee, or left at some central depository. From the ideas of staff members submitted, as well as from the Suggestion-Box Committee ideas, monthly meetings of the latter group would be the vehicle for analyzing the viability of each idea and for refining these concepts into practical, workable solutions that staff members can use. The Suggestion-Box Committee would be responsible for putting together a report of such solutions and then deciding whether or not some of the recommended actions should have higher authority approval, or whether or not the solutions could be passed directly on to all appropriate staff members to use as they might see appropriate. If the former is the case, any such solutions would be given to the Special Education Council for their reaction. If the latter is the case, those types of solutions would be passed immediately on to staff, again perhaps through Dr. Illuzzi's personnel newsletter. One feasible way of handling the higher-level decision would be to predetermine which solutions fall into either category and making separate, small mini-reports.

FIGURE 1

THE SUGGESTION BOX TECHNIQUE: A VERSION OF THE GENERAL PLANNING PROCESS MODEL RECOMMENDED BY THE PROGRAM EVALUATION COMMITTEE FOR THE LEARNING AND ADJUSTMENT PROGRAM


IDEAS SUBMITTED ON TOPIC OF MONTH TO SUGGESTION BOX BY ANY INTERESTED STAFF
MONTHLY MEETINGS OF INTER-PROGRAM SUGGESTION-BOX COMMITTEE TO SELECT VIABLE IDEAS FOR CHANGE
SUGGESTION-BOX COMMITTEE RE-FINES VIABLE IDEAS
SUGGESTION-BOX COMMITTEE PUTS TOGETHER REPORT OF PRACTICAL SOLUTIONS
DO ANY SOLU-TIONS NEED HIGHER APPROVAL?
Yes
No
REPORT IS SENT TO COUNCIL AND REACTION ELICITED
REPORT IS DISSEMINATED TO ALL APPRO-PRIATE STAFF AS RESOURCES FOR USAGE

The Committee recommended that a reward system be instituted for teachers and other staff members. For instance, any staff member whose idea was the basis for a solution put forward by the Suggestion-Box Committee might be allowed to "raid" the materials storeroom at the Special Education Center (within reason, of course!). Other incentives to staff to encourage them to use the Suggestion-Box process could be devised.

The Committee felt very favorable toward this Suggestion-Box technique. The only alternative procedure that was considered by the Committee was an ombudsman approach toward idea generation. However, the latter technique was not pursued by this Committee.

APPENDIX D

SHORT-RANGE PLANNING MODEL

FROM THE VISION PROGRAM

1. GENERAL PLANNING PROCESS MODEL

The Committee recommended the use of a standard questionnaire form as given in Appendix A to this Report. The Committee included items that for the most part were of four-point rating scale type, indicating the need for change. The scale ranges from 1 (in need of much change) through 4 (in need of no changes). Only the major topics of anticipated concern were put on the form. A final item on the form allows all respondents to put forth any open-ended comments that they desire. As it stands, the form can be used for eliciting IU Program staff input. With some minor changes, this form probably can be used for district respondents as well.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

STAFF INPUT FORM FOR GENERAL PLANNING

1. Name (optional) _____

2. Date _____

3. Program _____

4. Role Position _____

Instructions: For each of the following items, circle only one number to indicate the need for change (1=in need of much change, 2=in need of some change, 3=in need of minor changes, and 4=in need of no changes).

5. Communication

a. Between IU and District	1	2	3	4
b. Between IU and Parents	1	2	3	4
c. Between Your IU Program and Other IU Programs	1	2	3	4
d. Among Your Own Program's Staff	1	2	3	4

6. Curriculum and Instruction

a. Program Goals and Objectives	1	2	3	4
b. Curriculum Development				
(1) Vocational	1	2	3	4
(2) Social	1	2	3	4
(3) Academic	1	2	3	4
(4) Other (Specify _____)	1	2	3	4
(5) Other (Specify _____)	1	2	3	4
(6) Other (Specify _____)	1	2	3	4
c. Instructional Methods	1	2	3	4

7. Inservice

a. For District Staff	1	2	3	4
b. For Parents	1	2	3	4
c. For Other IU Programs	1	2	3	4
d. For Your Own Program	1	2	3	4

8. Allocation and Deployment of Resources

a. Materials	1	2	3	4
b. Equipment	1	2	3	4
c. Staff	1	2	3	4
d. Supplies	1	2	3	4
e. Monies	1	2	3	4

9. IEP Process

a. Selection of Goals and Objectives for Individual Student	1	2	3	4
b. Present Educational Levels and Evaluative Intake Data	1	2	3	4
c. Implications for Caseload and Scheduling of Contacts	1	2	3	4
d. Parent Conferences	1	2	3	4
e. Student Involvement	1	2	3	4
f. Other (specify _____)	1	2	3	4

10. Referral Process

a. Relationship to IEP	1	2	3	4
b. Implications for Scheduling	1	2	3	4
c. Uniformity of Evaluations	1	2	3	4
d. Types of Basal Data Forwarded by District	1	2	3	4
e. Involvement of IU Staff (When, Who, How)	1	2	3	4

11. Support Services

a. Types	1	2	3	4
b. When Utilized	1	2	3	4
c. How Utilized	1	2	3	4

12. What comments or suggestions do you wish to offer about any of the above topics, or any that were not included (please feel free to continue on the back or to attach addional sheets):

_____

_____

_____

_____

THANK YOU FOR YOUR COOPERATION

APPENDIX E

EXCERPT ON LONG-RANGE PLANNING FROM THE PHYSICALLY HANDICAPPED PROGRAM

The Physically Handicapped Committee also addressed the topic of long-range planning. The Committee recommends having about six highly articulate thinkers form a Long-Range Planning Group to address such concerns. The agenda might consist of:

(a) philosophy of mainstreaming and support for regular education;

(b) early planning for the post-21 education of our graduates;

(c) philosophy of the IU growth emphasis on various Least Restrictive Environment settings;

(d) community involvement in terms of awareness, communication, etc.;

(e) a truly coordinated, articulated curriculum for life-long learning;

(f) followup on life-long adjustment and implications for pre-21 activities

APPENDIX F

EXCERPT ON LONG-RANGE PLANNING FROM THE SEVERELY/PROFOUNDLY MENTALLY RETARDED PROGRAM

The Committee viewed the above general planning process model as related to more-or-less annual issues of concern. The Committee also felt, however, that long-range planning was essential if the Division of Special Education were to grow in a rational, even way to meet any changes in funding, enrollments, regulations, philosophy, and so on. The Committee recommended that the Division institute some long-range planning mechanism that would take into account clearly defined, long-term growth goals on what the Division wishes to achieve regarding what combination of service settings are most appropriate for meeting the needs imposed by the students themselves, their districts, and federal, state, and local regulations, standards, and laws) especially the concept of least restrictive environment). Society's values relative to education in general, and to special education in particular, as well as what type of awareness and/or educational activities are necessary for the lay population at large. The Division must begin to look at what the concepts of Program advancement, maintenance or regression mean for us over the years. Thus far we have not established any such planning mechanisms.

APPENDIX G

EXCERPT ON LONG-RANGE PLANNING FROM THE EDUCABLE MENTALLY RETARDED PROGRAM

With regard to the entire topic of general planning, the Program Evaluation Committee for the Mentally Retarded Program felt that long-range planning must be addressed as soon as possible. The Committee considered most of the efforts of this first topic of the general planning process model to be related to more-or-less annual planning, which it does not equate with long-range planning. In fact, the Committee put a priority on this topic and felt that some mechanism should be established. This is an issue Central Administration must attend to. All of the above, shorter range planning efforts should be linked to whatever long-range plan is established. With regard to what some of the content might be for a long-range plan, job placement should be a priority topic. Also in such a plan should be an articulated curriculum from Grades K through age 21, as well as plans for post-21 activities. This long-range growth model should include intra-I.U. components as well as external-agency coordination efforts. Community education could be the vehicle of many post-21 activities.

APPENDIX H

DISTRICT NEEDS ASSESSMENT RECOMMENDATIONS FROM THE LEARNING AND ADJUSTMENT PROGRAM

2. SPECIFIC NEEDS ASSESSMENT TECHNIQUES

The Committee felt that no needs assessment techniques in the Learning and Adjustment Program should be of paper-and-pencil variety. Instead, with the already existing framework of interactions that occurs on a very intensive level between IU staff and district staff, the mechanism already exists for easily collecting any structured needs assessment information that might be desired. This would be true for collecting the thoughts of both IU and district staff on any array of topics of interest to Dr. Banks or any Program Director.

This Committee saw two major methods of obtaining needs assessment information in a personally interactive manner. First, the Committee recommended that key district staff members (such as superintendents, pupil personnel directors, psychologists, and building principals) could be interviewed by a team similar to that which already works in the district setting. At the minimum, this team for needs assessment purposes might contain the supervisor, the master itinerant teacher, and the social worker. Second, some selected IU teachers from the Program could be asked to gather similar needs assessment information by interviewing district staff of both special education and regular education types (including teachers, nurses, physical education instructors, art instructors, and so on). In this way, information would be gathered in a fashion that is already somewhat familiar to district staff by virtue of the way in which the Learning and Adjustment Program is designed. The Committee feels that this personal approach by familiar people will produce a much more forward reaction by district staff and will tend to have information that is more detailed and to the point than any written procedure might.

A structured interview schedule of topics of some sort would have to be devised so that this personally interactive needs assessment procedure would not become too informal and in effect be unmanageable. Table 1 contains some tentative topics that might be placed into such an interview schedule when the framework is being devised. A time schedule of start and end dates for the collection of this information would have to be set so that the process does not linger on interminably.

The Committee felt that the exact structure of this recommended personal interaction process should be delayed until after internal IU staff have had a chance to input their own planning ideas in a fashion similar to that which is described for district staff. Both long-range and short-

TABLE 1

TOPICS FOR ADDING STRUCTURE TO THE VERBAL INTERACTION NEEDS ASSESSMENT TECHNIQUES FOR ASCERTAINING DISTRICT INPUT, RECOMMENDED BY THE PROGRAM EVALUATION COMMITTEE FOR THE LEARNING AND ADJUSTMENT PROGRAM

1. Mainstreaming
2. Inservice
3. Use of District Telephone
4. IU Admission/Intake Procedures
5. Discipline of IU Students in Non-IU Classes
6. Adaptive Physical Education
7. Deployment of Different IU Role Positions
8. Auxiliary Space Needed by L & A Program (e.g., cooling off area)
9. Communication between IU and District
10. Busing
11. IU Interpretation of Mandated Procedures
12. IEP Procedures for Newly Entering IU Students
13. Referral Procedures for Newly Entering IU Students
14. Use of IU Materials and Equipment
15. Use of District Materials and Equipment
16. Calendar Coordination

range planning should begin by taking into account IU staff ideas first before listening to the thoughts of any outside individuals, such as district employees.

The Committee completed its consideration of this needs assessment topic by discussing whether a written approach might be used in any other Programs. While the general feeling of the Committee as a whole was to recommend a personal interaction approach in all settings, the members did see some possibilities for written needs assessment techniques. One version was that a written approach could be used for all itinerant Programs (Speech and Language, Vision, Hearing), the Physically Handicapped Program, and the Severely/Profoundly Mentally Retarded Program. The personal interview approach would be followed in Programs such as the Learning and Adjustment Program, the Learning Disabilities Program, the Trainable Mentally Retarded Program, the Educable Mentally Retarded Program, and the Gifted Program. A second version of this issue was to consider a written approach for all itinerant programs and for all resource room operations (other than Learning and Adjustment and Learning Disabilities). The personal interaction approach in this case would then be used with all self-contained Programs (other than S/PMR and PH).

APPENDIX I

DISTRICT NEEDS ASSESSMENT

RECOMMENDATIONS FROM THE

SPEECH AND LANGUAGE PROGRAM

2. SPECIFIC NEEDS ASSESSMENT TECHNIQUES

This Committee recommends, in line with Dr. Banks' wishes for some input on how to gather district feedback on our services, the use of a form such as given in Appendix A. This Appendix contains a cover letter to introduce district respondents to the purpose of a needs assessment survey. The Appendix also contains a questionnaire for eliciting three types of information: (a) general background information; (b) ratings for identification of priorities for improvement; and (c) open-ended response questions for obtaining specific views of the district staff members. While the needs assessment form emphasises in the second area the extent to which a topic is in need of improvement, the Committee felt that it would be better to focus on awareness rather than satisfaction or extent of problems or amount of time. The only reason extent of improvement is used here is that it appears to be the closest that the Committee can come to in terms of eliciting what is really intended and yet not opening the door to unconstructive and self-defeating criticism. The Committee also felt that the open-ended items on this form would be of most value and in and of themselves represent the further opening of communication channels between the IU and the districts.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

Dear District Staff Member:

In an effort to enhance communication between the districts and the IU, your input is necessary to allow us to plan for the future growth of the Division of Special Education. We want your constructive criticism to allow us to continuously refine our responsiveness to your concerns. Your time taken to complete the enclosed questionnaire will benefit both you and us. We will tabulate the responses anonymously and feed back the results to you in the future. Thank you for your cooperation.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

NEEDS ASSESSMENT SURVEY
FORM FOR DISTRICT INPUT
INTO IU SPECIAL EDUCATION
PLANNING

A. GENERAL INFORMATION

DISTRICT _____

ROLE POSITION _____

DATE _____

B. IDENTIFICATION OF PRIORITIES FOR IMPROVEMENT

For each of the following areas of IU functioning as viewed by you in your district, please circle one number to indicate the extent to which you feel the topic is in need of improvement (1 = little improvement is needed/generally satisfied; 2 = some change is needed/operations are occasionally rough; 3 = a fair amount of improvement is needed/frequent difficulties are encountered; 4 = the area is greatly in need of improvement/procedures are unworkable):

1. District Awareness of IU Programs and Services	1	2	3	4
2. Role of IU Speech Clinician	1	2	3	4
3. Criteria for Case Selection	1	2	3	4
4. Role of District Staff in Relation to IU Staff	1	2	3	4
5. Policy Differences Between IU and District	1	2	3	4
6. Understanding Function of Itinerant Staff	1	2	3	4
7. Involvement of District Staff in IU Inservice	1	2	3	4
8. Involvement of IU Staff in District Staff Meetings	1	2	3	4
9. Screening Speech Cases	1	2	3	4

10.	Scheduling Therapy	1	2	3	4
11.	Cooperation Between District and IU	1	2	3	4
12.	Therapy Models/Caseload Management:				
	a. One-to-One	1	2	3	4
	b. Small-Group	1	2	3	4
	c. Large-Group	1	2	3	4
	d. Consultant to District Teacher	1	2	3	4
13.	Frequency of Therapy	1	2	3	4
14.	Amount of Time Devoted to Therapy	1	2	3	4
15.	Communication of IU Staff With:				
	a. Parents	1	2	3	4
	b. Regular Education Teachers	1	2	3	4
	c. Principals	1	2	3	4
	d. District Psychologists	1	2	3	4
	e. School Nurses	1	2	3	4
	f. Directors of Pupil Personnel Services	1	2	3	4
	g. Social Services Staff	1	2	3	4

C. SPECIFIC SUGGESTIONS FOR CHANGES

The following items are designed to allow you to input whatever specific comments you wish to offer on many crucial topics. Please feel free to continue on the reverse of the pages or to attach additional sheets.

16. What can be done to facilitate involvement of various district staff members at all levels in IU programs and services?

_____

_____

_____

_____

17. What types of information and supportive services does the district's regular education teacher and other staff need:

    a. While a student is still in an IU program or service?

    _____

    _____

    _____

    b. When the special needs student has been released from an IU program or service?

    _____

    _____

    _____

18. How can a feasible working arrangement be made for some degree of IU access to district telephone, message, and secretarial services?

    _____

    _____

    _____

19. How can communication between district and IU staff be facilitated?

    _____

    _____

    _____

20. What topics might be appropriate for ongoing (or isolated) inservice training or awareness sessions?

    _____

    _____

    _____

21. What other comments do you wish to offer?

    _____

    _____

    _____

APPENDIX J

DISTRICT NEEDS ASSESSMENT RECOMMENDATIONS FROM THE CLASSROOM HEARING IMPAIRED PROGRAM

2. SPECIFIC NEEDS ASSESSMENT TECHNIQUES

At the time that this Committee was meeting, Dr. Banks, Director of Special Education, was interested in obtaining feedback from district personnel on how the Intermediate Unit's Division of Special Education operation might be improved. Dr. Banks considered this a vital area of needs assessment for the Division to undertake. Accordingly, he asked that the several Program Evaluation Committees would consider this particular type of assessment activity. In line with Dr. Banks' wishes, the present Committee devised a form on which to gather written responses of district staff members on how the Intermediate Unit might improve its activities. This form is contained in this Report as Appendix B. It should be noted that the Committee kept in mind while devising this particular version of a needs assessment form, that the input of Intermediate Unit staff would be gathered first before turning to districts for their outside input. Thus, this activity for district involvement might not occur until a year after the general planning process model had been in operation, as well as any specific needs assessment follow-up data-gathering activities on particular topics had been conducted with Intermediate Unit staff.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

DISTRICT NEEDS ASSESSMENT SURVEY

PART I: BACKGROUND INFORMATION

1. DISTRICT: _____

2. ROLE POSITION: _____

3. DATE: _____

PART II: YOUR OPINIONS

4. For each of the following topics, please rate them to indicate the extent to which they pose a problem to you in your district role position on a day-by-day basis.

a. Communication to you from the following IU personnel:

	No Problem Exists	Changes to Be Made: Some	Changes to Be Made: Many	Needs Total Reworking	Not Applicable
(1) Administration	( )	( )	( )	( )	( )
(2) Supervisors	( )	( )	( )	( )	( )
(3) Psychologists	( )	( )	( )	( )	( )
(4) Teachers	( )	( )	( )	( )	( )
(5) Auxiliary Services (Speech, Hearing, Vision)	( )	( )	( )	( )	( )
(6) Social Workers	( )	( )	( )	( )	( )
(7) Occupational Therapy and/or Physical Therapy	( )	( )	( )	( )	( )
(8) Teacher Aides	( )	( )	( )	( )	( )
(9) Psychiatrists	( )	( )	( )	( )	( )

(10) Please give us suggestions for improving any of the above areas:

_____

_____

_____

b. IU Procedures, Policies, and Processes:

	No Problem Exists	Changes to be Made: Some	Changes to be Made: Many	Needs Total Reworking	Not Applicable
(1) Transportation	( )	( )	( )	( )	( )
(2) Location of IU Classes	( )	( )	( )	( )	( )
(3) School Calendars	( )	( )	( )	( )	( )
(4) Referrals	( )	( )	( )	( )	( )
(5) Student Records	( )	( )	( )	( )	( )
(6) Discipline	( )	( )	( )	( )	( )
(7) Delivery of IU Materials	( )	( )	( )	( )	( )
(8) Use of District Materials	( )	( )	( )	( )	( )
(9) Acquisition of Substitutes	( )	( )	( )	( )	( )
(10) Completion of IU Forms	( )	( )	( )	( )	( )
(11) Arrival and Dismissal Times	( )	( )	( )	( )	( )
(12) Use of IU Materials	( )	( )	( )	( )	( )
(13) Availability of IU Materials	( )	( )	( )	( )	( )
(14) Working Space for IU Staff	( )	( )	( )	( )	( )
(15) Visitors to IU Classes	( )	( )	( )	( )	( )
(16) Emerging Procedures	( )	( )	( )	( )	( )
(17) IU Psychological Evaluations	( )	( )	( )	( )	( )
(18) IEP's	( )	( )	( )	( )	( )
(19) Parent Contents	( )	( )	( )	( )	( )

(20) Please give us suggestions for improving any of the above areas:

_____

_____

_____

c. Mainstreaming

	No Problem Exists	Changes to be Made Some	Many	Needs Total Reworking	Not Applicable
(1) Prior Information on Handling	( )	( )	( )	( )	( )
(2) Prior Information on Specific Child	( )	( )	( )	( )	( )
(3) Ongoing IU Support in Implementing the Program	( )	( )	( )	( )	( )
(4) Feasibility of Resultant Class Size	( )	( )	( )	( )	( )
(5) IU Help in Pre-planning a Specific Child's Mainstream Program	( )	( )	( )	( )	( )

(6) Please give us suggestions for improving any of the above areas:

_____

_____

_____

_____

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

Dear District Staff Member:

As with any large organization which is continuously evolving and growing, the Intermediate Unit is concerned about what changes district staff members (being the primary "clients" of our agency) desire in various IU programs and procedures. In response to this district interest in IU planning, the IU is undertaking a survey to gain additional systematic input. Wherever further clarification and study is needed, the IU will be following up with selected district representatives. Enclosed you will find a brief survey designed to minimize your time of responding and yet allow you the opportunity to express all your desires. We value your input and ask that you take some time to respond to these issues.

Thank you for your help.

BBP:h

APPENDIX K

DISTRICT NEEDS ASSESSMENT

RECOMMENDATIONS FROM THE

LEARNING DISABILITIES

PROGRAM

2. SPECIFIC NEEDS ASSESSMENT TECHNIQUES

With regard to the desire of the Division to have a vehicle for allowing district staff member input into the planning process of the Division, the Committee considered different methods of data collection. For instance, the Committee discussed the interview approach. While interviews might allow a great deal of information to be collected in exhaustive detail, far too much time would be needed to carry out any level of interview data collection, and inefficiency would no doubt result. Thus, the Committee recommended that for the intention of allowing as many district staff members as possible to contribute to our overall Division planning process, a paper-and-pencil approach is necessary. However, the Committee also allowed for the possibility that selected respondents to the form might then be asked to participate in a followup interview to provide a sample of representative and more intensive feedback. The Committee felt the form should be as objective as possible. The form should be anonymous, although district identification and role position information could be collected to help tabulate the information in a more meaningful fashion.

The Committee then began to devise a form to meet the needs of this particular area of discussion. The result is contained in Appendix B. One sees a survey instrument entitled, "District Needs Assessment for IU Division of Special Education Planning." This form is similar in structure to that of Appendix A.

The Committee recommended that this form for district input might be distributed around February of the school year. The Committee felt that all role positions of district staff should be allowed input, including not only teachers but also principals, pupil personnel directors, psychologists, and so on.

In concluding its consideration of this area of district input into the Division's general planning process, the Committee expressed some concern on how IU staff can in turn offer to districts some input for district operations. This particular topic needs further exploration.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

DISTRICT NEEDS ASSESSMENT FOR IU
DIVISION OF SPECIAL EDUCATION PLANNING

Overview: The IU Division of Special Education wished to have your input on major aspects of our Program activities for exceptional students. We would appreciate your taking a few minutes to fill in this questionnaire. All responses will be kept confidential.

PART A: GENERAL BACKGROUND

1. District _____
2. Your Role Position _____
3. Date _____
4. Types of IU Students You Have Had Contact With _____

_____

PART B: REACTIONS TO SERVICES

Instructions: For each of the following topics, please circle one response only to indicate your assessment of this item.

	Good	Satis-factory	Needs Improve-ment	Unsatis-factory	Not Appli-cable
1. Communication Topics					
a. Routine Communication Between District and IU	G	S	NI	U	NA
b. IU Requests of Districts to Collect and Forward Information	G	S	NI	U	NA
c. District Requests of IU to Collect and Forward Information	G	S	NI	U	NA
d. Content and Components of IU Records and Reports	G	S	NI	U	NA

e. IU Inservicing of District Staff on Nature of Program	G	S	NI	U	NA
f. Transfer of Health Records	G	S	NI	U	NA
g. Transmission of Student Records	G	S	NI	U	NA
2. Procedures and Policies					
a. IEP Process	G	S	NI	U	NA
b. LD Intake Process	G	S	NI	U	NA
c. Referral Process	G	S	NI	U	NA
d. Interpretation of Federal and State Mandates by IU	G	S	NI	U	NA
e. Usage of IU Materials	G	S	NI	U	NA
f. Usage of District Materials	G	S	NI	U	NA
g. Miscellaneous Personnel Policies Across IU Programs	G	S	NI	U	NA
h. Busing	G	S	NI	U	NA
3. Student Factors					
a. Mainstreaming of IU Students Back Into Regular District Classes	G	S	NI	U	NA
b. Placement of Out-of-District Students	G	S	NI	U	NA
c. Differences Between Student Populations Served by Districts or IU	G	S	NI	U	NA
4. Administrative Issues					
a. Role Descriptions of Teachers	G	S	NI	U	NA
b. Nature of Involvement of District Teachers With IU Classes	G	S	NI	U	NA
c. Student Attendance Recordkeeping	G	S	NI	U	NA

d. ADMs	G	S	NI	U	NA
e. Deployment of IU Support Staff	G	S	NI	U	NA
f. Involvement of IU Staff in District Activities	G	S	NI	U	NA

5. What specific comments do you wish to offer on any of the above (please continue on the reverse of this page or attach additional sheets):

THANK YOU FOR YOUR COOPERATION.

APPENDIX L

GUIDELINES FOR OUTSIDE PROGRAM EVALUATION CONSULTANTS FROM THE ITINERANT HEARING IMPAIRED PROGRAM

3. OUTSIDE PLANNING INPUTS

This Committee decided that a type of manual or set of guidelines should be composed for the most fruitful deployment of outside expert consultants brought in to evaluate programs. Accordingly, this Committee considered recommendations under nine major areas: (1) criteria for consultant selection; (2) contract between IU and consultant; (3) materials to be sent to consultant by IU Program; (4) IU preparation for consultant visit; (5) activities to be engaged in by consultant; (6) specific topics to be examined by consultant during visit; (7) criteria for program evaluation to be used by consultant; (8) immediate outcome of consultant visit; (9) follow up between program and consultant.

With regard to the first topic of the criteria for consultant selection, the Committee recommends that it consider first and foremost what the needs of the Program are in having an expert comment upon the various topics to be examined. If the Program's outside consultant evaluation is to be an overall, multi-dimensional approach, then it would seem that acknowledged experts in the field could be selected from sources such as individuals prominent in the literature of this exceptionality. Intermediary contacts (such as from local universities and colleges, as well as other local educational agencies) can be used as resources for the initial

selection of possible candidates for the job. The Committee recognizes that in the past many consultants have been selected in the fashion of a "sole-source contract." That is, only one individual was even considered, and no further consideration was given of possible alternatives. This Committee recommends that the Program carefully compose on the basis of its needs for program evaluation a list of highly qualified experts from which to choose. Once the Program has decided upon a small, feasible list of possible consultants, the Committee recommends that the individuals listed be contacted and further information on their backgrounds be obtained. In particular, the Committee is interested in each individual's experience in program evaluation and in applied Program activities of the same type as our local setting. The Committee would be interested in how each individual has gone about their program evaluation consultation in the past to see how well organized they have been with regard to the structure that is presently being recommended by this Committee in this Report. The Program would have to look at cost factors with regard to how agreeable each individual is to whatever the stated rate is within the Division of Special Education. Does the potential consultant have a strong bias in any particular direction? Will the consultant specify to us any evaluation questions he has and his demands for information? Perhaps one of the most telling probes of all, in the opinion of this Committee, would be to ask the consultant what he needs to carry out his job. The Program should be able to determine fairly quickly how much potential for carefully structured input this consultant will have for the various concerns that our local Program puts forward. After this quasi-interview probing has occurred, the Program should be in a position to make a final selection of one or more consultants that will be able to deliver what is desired.

The second topic of these guidelines for consultant usage is the contract between the IU and the consultant who is to be used as a program evaluation expert for on-site visitation purposes. The Committee recommends that the contract include a brief description of at least each of the following topics: end results (a written report, an exit interview, or whatever the Program desires); primary purposes of the visit; nature of the activities to be engaged in during the visit and topics to be addressed; any follow-up process that the Program desires; cost factors (honorarium plus expenses, with limits clearly spelled out); amount of time to be spent in the program evaluation activities (preparation time of the consultant prior to arrival, actual visit time, report writing time after the visit, follow-up activity time); and what the IU obligations are.

The third topic is the materials that are to be sent to the consultant by the IU Program. Table 1 contains the recommendations of this Committee for this area.

The fourth topic of these guidelines is IU preparation for the on-site consultation visit. Local staff have to be informed of what the consultant is going to look at and how he is going to go about it. In this regard, the Committee thought perhaps a copy of the contract itself should be given to each staff member of the Program. Also in terms of informing local staff, some Program administrator must take responsibility for insuring that all Program staff are available at all levels at specified

TABLE 1

BACKGROUND MATERIALS TO BE SENT TO OUTSIDE PROGRAM EVALUATION CONSULTANT BY IU PROGRAM, AS RECOMMENDED BY THE PROGRAM EVALUATION COMMITTEE FOR THE ITINERANT HEARING IMPAIRED PROGRAM

1. Contract for Program Evaluation Between IU and Consultant
2. Mutually Agreed Upon Schedule for Visit
3. Description of Agency
4. IU Organization Chart
5. Map of County With Designation of Where Program Classes Are
6. Description of Program
7. Demographic Background of Program (numbers of children and staff)
8. Student Population Description (age, severity, sex, service settings, use and type of amplification, other handicaps)
9. Staff Description (background, experience, training, certification)
10. Job Descriptions for Each Role
11. Curriculum Guide
12. Program Resource Manual ("CHOICES")
13. Pupil Evaluation Procedures
14. Anonymous Sample IEP
15. Referral Manual
16. List of Parent Groups
17. Internal Program Evaluation Procedures
18. Outside Agencies and Resources
19. State Standards

times of individual visits. Further, if selected district staff and selected parents are to be involved, then suitable arrangements must be made well in advance for such events. Support staff may also be part of the consultant's agenda and these details must be attended to beforehand. Another area of preparation, of course, is the gathering of materials that were mentioned earlier in connection with Table 1. The Program will have to finalize arrangements for the consultant's travel and room. Working space should be provided for those activities within the agenda that require the consultant to meet with individuals and perhaps to do some report writing. Secretarial resources, if necessary, should be arranged. Whatever records and documents the consultant will need to examine should be placed within the working space area that will allow him privacy and peace and quiet to go through such items.

The fifth topic is the set of generic activities to be engaged in by the consultant during his on-site evaluation duties. These activities include but are not necessarily limited to examination of pertinent documents and records; observation of staff and students in classroom activities; individual and/or group conferences with IU staff at all levels, IU students, parents, and selected district personnel; appropriate data gathering and recording; feedback exit interview prior to leaving; report writing; and post-evaluative follow-up procedures, if desired by the Program. The latter topic, it might be noted, the Committee sees as perhaps reaction from the consultant to any projected changes the Program has planned in response to the evaluation report.

The sixth topic involves the specific areas to be examined by the consultant during the visit. These items are provided in Table 2, as recommended by this Committee.

The seventh topic consists of the criteria for program evaluation to be used by the consultant during his on-site activities. This topic was recognized by the Committee as being one of the most difficult of all to address in that no agency at the federal, state, or local level has ever defined this area clearly. This perhaps is one reason why the concept of an "appropriate" education is so difficult to define in situations such as hearing. At any rate, this Committee was able to determine four distinct evaluation questions that can guide any outside expert program evaluation consultant for on-site purposes. These four questions are: (1) did you do what you claimed you would? (2) how much quality within this framework was exhibited? (3) are there better alternative ways to do what you claim you wanted to do? (4) were there activities not included in the Program description, goals, objectives, and activities that should be part of an appropriate Program design? The criteria for judging these four areas involve several dimensions. The first two questions can both be judged by examination of existing documents about the Program design and by carrying out observation of ongoing activities. In addition, the second question can also be addressed by a third criterion, namely, examination of accumulated Program-wide performance data on student mastery. The third and fourth questions can both be addressed by two criteria: the past experience of the consultant in similar Program settings and the state-of-the-art of this Program field of exceptionality, such as given by the professional literature in this area. The Committee feels that if

TABLE 2

TOPICS TO BE INCLUDED IN THE ON-SITE EVALUATION OF A PROGRAM BY THE OUTSIDE EXPERT PROGRAM EVALUATION CONSULTANT, AS RECOMMENDED BY THE PROGRAM EVALUATION COMMITTEE FOR THE ITINERANT HEARING IMPAIRED PROGRAM

1. Program Goals
2. Curriculum
3. Teaching Techniques
4. Referral Procedures
5. Pupil Evaluation Procedures
6. Pupil Demission and Mainstreaming Criteria
7. Parent Involvement
8. Materials
9. Facilities
10. Staff Qualifications
11. Deployment of Staff Time
12. Role Definitions
13. Staff Inservice
14. Teacher Evaluation Procedures
15. Coordination With Outside Agencies and Resources
16. Coordination and Communication With Districts
17. Coordination With Other IU Programs and Services
18. Intraprogram Staff Communication
19. Staff Involvement in Program Development and Planning
20. Program Self-Improvement Procedures
21. Compliance With Federal and State Laws, Regulations, and Standards

these four basic evaluation questions and the associated multiple criteria are kept in mind by both the evaluation consultant and the internal Program staff, that the on-site evaluation process can be a very objective and beneficial activity.

The eighth topic under outside consultants to be considered by this Committee was that of the immediate outcomes of the consultation visit. The Committee felt there should be three major aspects of an on-site visit. First, at the conclusion of the on-site visit, the consultant should provide an exit feedback interview with the entire staff in an informal fashion to allow a presentation of some of the highlights of what he has observed and will be recommending. Second, the consultant should be expected in any case to write a formal report that would be self-contained so that any individual in the future could read the report with profit and without having to rely on others for further explanation. Apart from describing all of the procedures and background for the on-site evaluation, the formal Report of the consultant would include a number of findings and recommendations, arranged by topical breakdown in a systematic fashion (perhaps by the list of topics included earlier in the current report in Table 2). Third, there would be a followup evaluation activity between the Program and the consultant. In particular, the response of the IU Program to the recommendations for change contained in the consultant's Report would be outlined to the consultant as the IU's intended plan of action to improve the Program. A brief response would be expected from the consultant with regard to the intended courses of action that the Program had decided upon. At this point, the consultant's obligations would be considered met, unless further arrangements were made between the Program and the consultant to do even more followup work.

Finally, this Committee recommended a few miscellaneous points with regard to scheduling of these on-site outside evaluation visits. The Committee felt that the bringing in of an outside expert consultant should be part of a five-year growth plan for the Program. The input from the consultant could be used in revising the five-year long-range plan for the Program. The timing of the consultant's visit within the school year in which it was to occur was recommended by the Committee to be around January or February so that the consultant and the staff members would have had a chance to reflect back upon fairly well established procedures for that given school year.

APPENDIX M

IDEAS FOR VARIOUS OUTSIDE PLANNING INPUTS FROM THE TRAINABLE MENTALLY RETARDED PROGRAM

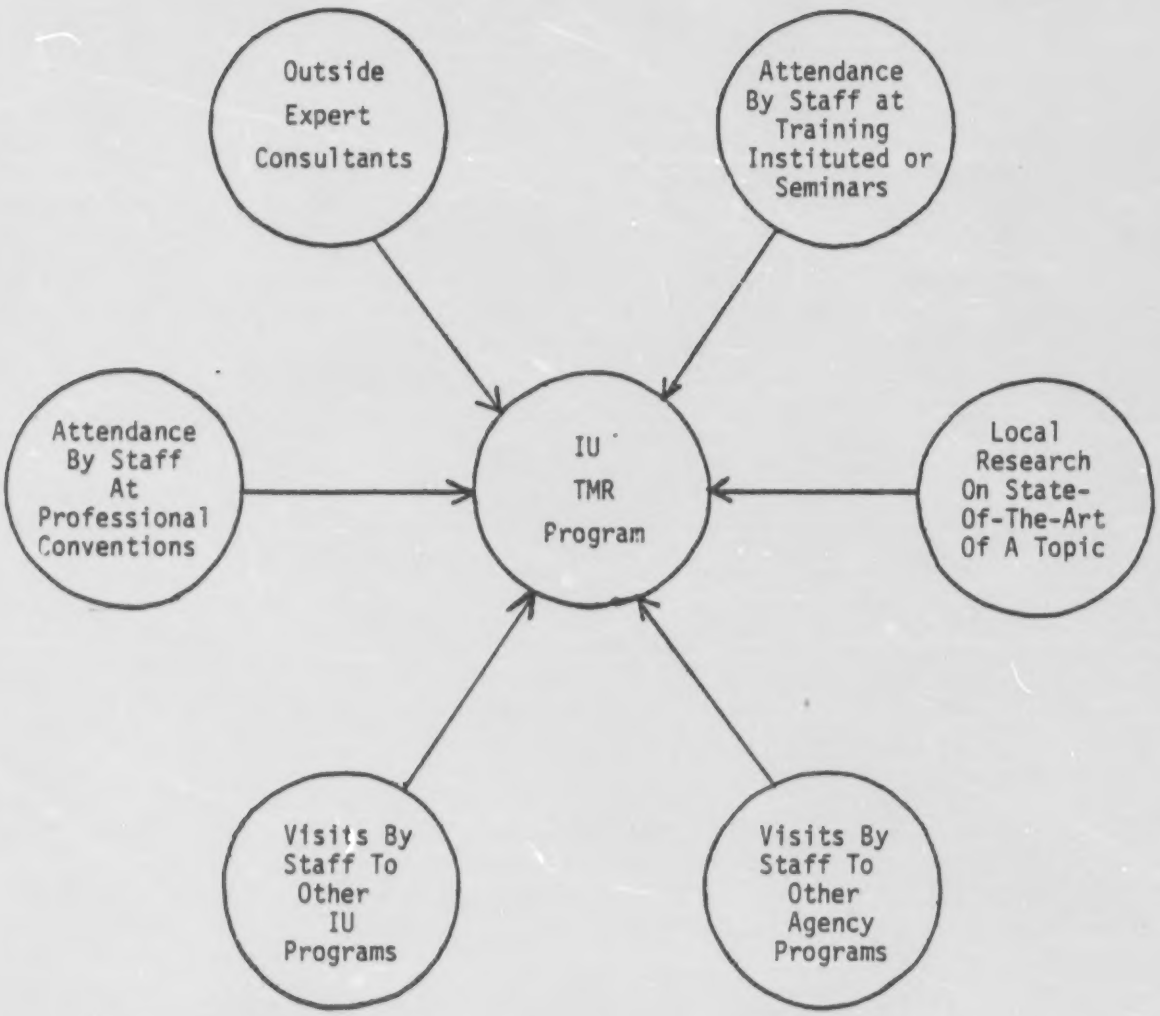
3. OUTSIDE PLANNING INPUTS

In the introductory sections to this Report. several subtopics were mentioned as being appropriate for inclusion under the present area. Dr. Matilsky suggested that the attached schematic be used to help conceptualize the deployment of these outside planning resources for program evaluation and improvement purposes (see Figure 1).

This Committee spent some time on how the planning input of outside type given in Figure 1 could be used not only to improve the program, but also to promote the sharing of ideas among staff members within the program. The Committee recommended that the newsletter be developed for the Division of Special Education (a la Sandy Zuchero and Larry Mazzoli). The Committee also recommended that multiplier effects for dissemination be employed with regard to any course work taken by staff members. If an inservice presentation is being planned, it should be taped, if at all possible, for later usage and sharing. If a staff member is going to make use of any of the outside planning input given in Figure 1, then the staff member should con-

FIGURE 1

SCHEMATIC OF HOW OUTSIDE PLANNING INPUTS CAN AID IN CONTINUOUS IMPROVEMENT OF THE TRAINABLE MENTALLY RETARDED PROGRAM (SUGGESTED BY DR. MATILSKY)


Outside Expert Consultants
Attendance By Staff at Training Instituted or Seminars
Attendance By Staff At Professional Conventions
IU TMR Program
Local Research On State-Of-The-Art Of A Topic
Visits By Staff To Other IU Programs
Visits By Staff To Other Agency Programs

sider generating a brief but informative report on what was of value in that particular method of input. Based upon any staff member's report that is generated from an outside input, there are several program dissemination options that should be explored: (1) The Report should be banked with the Division of Special Education Library; (2) The Program should consider whether holding a special inservice meeting on this topic is justified; (3) The crucial details from the Report should be placed in the Division of Special Education newsletter; (4) The Report should be copied and sent to all staff members within this Program (and possibly in other programs); (5) The Program's staff members who were most involved with the outside input should be considered for floating around to share the ideas with other staff members; (6) A special "montage" Inservice Council Court should be considered for development to include any worthy ideas or approaches gathered from the past year's planning input of outside types; (7) Regularly scheduled inservice days within the Department of Mentally Retarded and Physically Handicapped Programs should be considered for usage by staff members to visit other classrooms within this set of programs or other programs, as well as for Mini-Grant awardees to float among program staff.

With regard to any of the dissemination options just described above, if inservice courses or days were scheduled and certain staff members did not feel they could benefit to a maximum extent from such presentations, the Program could consider allowing other options for skill enhancement. For instance, the Committee recommends that the staff members be allowed to pay visits to other classrooms (even if in different programs) during the time they would normally spend in their own Program's inservice offerings for that day.

If a professional convention is about to be held at the local, state, or national level, the Committee recommends that the program of the convention be examined intensively ahead of time and that staff members be assigned to attend these sessions and to submit reports back to the program on the important ideas presented. These reports would then be processed and shared through the seven possibilities of dissemination listed above in this Report.

The Committee also considered some criteria to use as to whether the Program opted for an outside planning input or for inside planning resources. In particular, the Committee conceptualized the use of these "outside" planning inputs of being two varieties. First, there is the case where a Program ("inside") staff member is sent to the source of the outside input, which we can term "inside/outside." Second, there is the case where an outside source of planning input is brought to our local setting, which we can term "outside/inside." The criterion to be used in selection of either option can be stated as follows: if specific training is involved, or if a highly technical topic at the local setting be outside input to further such efforts, then an expert can be brought to the Program ("outside/inside"). Otherwise, if the outside input is of a relatively simply arranged version, such as technical information gathering, it would appear to be less expensive to send one of our Program staff to the source of the outside input ("inside/outside"). In the latter case, there would be no honorarium to pay. An example of the latter situation, is attendance at a professional

convention or at a technical seminar. With regard to visit to other IU programs or to outside agencies, the Committee devised a brief reporting form for use in such situations. Appendix A contains the form that this Committee recommends be used.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

PROGRAM OBSERVATION REPORT

(OUTSIDE PLANNING INPUT)

Directions: This brief recording form is to be used by IU staff members who are sent to gather planning input to observe classes within their same IU Program, IU classes in a different Program, or classes operated by an agency other than the Montgomery County Intermediate Unit. The IU staff members who are making these observation visits are encouraged to make additional comments on the back of these sheets or on attached sheets.

PART I: GENERAL INFORMATION

IU Observer _____

Observer's Program _____

Date(s) of Visit _____

Observed Program/Agency Name _____

Observed Program Location(s) _____

Number and Ages of Clients Served _____

Purpose of Visit _____

_____

PART II: OBSERVATIONS

For each of the following items, check only one option (and explain why) as to how the items compare to the same topic for our similar IU Program:

	Poorer	About The Same	Better	Why?
1. Program Goals	( )	( )	( )	_____
2. Instructional Goals	( )	( )	( )	_____
3. Staff Resources and Deployment	( )	( )	( )	_____
4. Instructional Materials	( )	( )	( )	_____

	Poorer	About The Same	Better	Why?
5. Facilities	( )	( )	( )	_____
6. Supervision and Administration	( )	( )	( )	_____
7. IEP Procedures	( )	( )	( )	_____
8. Compliance with Legal Mandates	( )	( )	( )	_____
9. Progress Reporting	( )	( )	( )	_____
10. Measurement Procedures	( )	( )	( )	_____
11. Referral Procedures	( )	( )	( )	_____
12. Other (Specify):	( )	( )	( )	_____
13. Other (Specify):	( )	( )	( )	_____
14. Other (Specify):	( )	( )	( )	_____
15. Other (Specify):	( )	( )	( )	_____

16. General Program Comments: _____

_____

_____

_____

PART III: IMPLICATIONS FOR IU PROGRAM

17. Materials Available and Appropriate for Our IU Program (please specify their nature, from whom they can be obtained, any costs, etc.): _____

_____

_____

_____

18. Based on this visit, what modifications in our IU Program shall be made:

_____

APPENDIX N

IDEAS FOR VARIOUS OUTSIDE PLANNING INPUTS FROM THE SPEECH AND LANGUAGE PROGRAM

3. OUTSIDE PLANNING INPUTS

Among the outside planning inputs considered by this Committee were convention attendance, visits to Programs, and the use of expert outside consultants.

With regard to conventions, this Committee recommends that written reports be required of any IU staff members that have the opportunity to attend professional conventions or other presentations. The Committee also recommended that any attendee upon his return provide a brief oral presentation of highlights of various sessions and topics found at the convention. The latter type of IU dissemination could occur at regular Program staff meetings.

With regard to visits to other Programs, this Committee saw a number of avenues to explore. Visits to non-IU Programs could be allowed throughout Montgomery County. Perhaps of even more value might be visits to other types of IU-operated Programs and services. For instance, the Committee could see staff members from this Program observing other colleagues who are also in this Program. Also, the Committee recommended that perhaps monthly study groups could be established to consider various topics within the Program and to serve as an exchange of ideas. Further, early dismissals could be used to allow a teacher or clinician to take part in visits to various Programs within the County. The extent of early dismissal time could vary up to a half-day in length. A benefit for individual staff members that would accrue as a result of visits being carried out would be the gathering of various types of handouts and materials that they were otherwise unaware of.

APPENDIX O

EXAMPLE OF PROGRAM-WIDE STUDENT PERFORMANCE DATA COLLECTION FROM THE GIFTED PROGRAM

4. CHILD-ORIENTED DATA TOPICS

The Committee considered a few related topics under this broad area, such as the use of standardized tests for progress measurement of individual children and evaluation of the Program as a whole, the use of questionnaires that tap more subjective opinions in these areas, and specially devised measurement instruments for use within this Program. With regard to standardized tests, the Committee saw very little value for measuring individual student growth by this technique. Most standard measures of various dimension of giftedness are meant primarily for diagnostic intake purposes or for research usage. Thus, these instruments would have very little value with respect to the concept of growth over time.

The Committee considered a booklet entitled Evaluation, issued about 1977 by Allegheny Intermediate Unit No. 3 (edited by Nora Cohen of the School District of Philadelphia and Roberta Feldman of Allegheny IU). This booklet included many subjective/opinion questionnaire-type instruments on the topic of gifted program evaluation. Some instruments are rather matter-of-fact in that they ask clearcut questions on how to improve specific components of a gifted program, using as respondents individuals such as regular class teachers, parents, and administrators. Some instruments are designed for student response and again are of very factual question type. Some approaches contained in the booklet emphasize a framework of an IEP, focusing for instance upon various areas that might be placed into any IEP. Examples would be foreign language; a special goal involving risk taking, independence, or imagination in a certain area; a special goal involving sharing, interrelating, communicating, expressing, completing, or socializing with regard to a certain topic; a special group project and/or individual project; a special type of problem solving activity; a special goal dealing with the aquisition of certain types of information; a special goal dealing with communicating ideas effectively; and so on. Other types of evaluation instruments contained in this booklet dealt with the taxonomy idea, especially as put forth by Joseph Renzulli. For instance, under cognitive functioning, one might see a hierarchy ranging from knowing/remembering; to comprehension (translating, interpreting, extrapolating); to application of ideas to specific situations; analyzing; synthasizing and creating; and evaluating and judging. Under affective activities, one might have the development of interests in and commitment to some topic; the development of skills that lead to better relations between people; and the development of attitudes and values toward certain issues. Special attention might also be given on the teacher-completed form to projects and products for which the student was responsible. With regard to all of the techniques, the Committee felt that one must be very leary of adding any additional paperwork evaluation procedures, either for judging individual student growth or for evaluating the program as a whole. The Committee generally did not seem favorably inclined toward the majority of these paper-and-pencil, subjective rating and/or comment evaluation procedures.

When one turns to the attempt to objectify to any degree the nature of student progress that is occurring in any specific goal area or project area, it is clear from the discussions with the Committee that one meets with a tremendous number of obstacles in this Gifted area. One of the most complicating factors is the Program's nature not to consider a product or set of knowledge constructs as ends in and of themselves. Such items are merely means to an end, one of the main "ends" being the inculcation of certain processes of thinking and reasoning as put forward in standard taxonomies. Rather than concentrate on fairly common paper-and-

pencil techniques as discussed above in connection with the booklet Evaluation, this Committee took an initial attempt at building a framework for somewhat more objectively and measurably assessing student progress. Appendix C contains the results of this effort ("Gifted Program Progress Report"). While additional work is necessary on this topic, Appendix C represents this Committee's attempt to put forth a more common framework for ongoing progress reporting throughout a school year so as to focus on the several processes that this Program attempts to foster. Of note to this form is the fact that the project or product activities have been deemphasized to being included only as final comments for each of the report periods. Following the more or less standard taxonomy breakdown, general process criteria have been listed in the column to the left with four major categories: cognitive, creativity, research skills, and affective. Each major goal and/or objective for which the Program feels it should provide a progess report to the student and to the parent during the school year is to be placed upon a separate report sheet. The form would be devised for NCR paper to allow successive reporting period information to be reflected for both teacher and student.

The Committee also discussed methods of setting expectations for student performance, based upon individual strengths and weaknesses. In the area of the Gifted Program, the Committee felt there might be four sources of such information: regular education teacher, student, parent, and the Gifted Program teacher. Exactly how to derive such expectation standards was not resolved by this Committee.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

IU GIFTED PROGRAM STAFF INPUT
FOR ANNUAL PLANNING

Overview: Each school year the IU Gifted Program asks for assistance in planning its growth for the future. This is your opportunity to offer constructive suggestions for improvement, and we hope you make use of it. Below you see four columns: Topics, Strengths, Problems, and Suggestions. Please take a few moments to fill in the columns as you see appropriate. Use the reverse of this page or attach additional sheets, if you need more room.

TOPICS	STRENGTHS	PROBLEMS	SUGGESTIONS
1. Scope of Curriculum	1.	1.	1.
2. Sequence of Curriculum	2.	2.	2.
3. Class Size	3.	3.	3.
4. Facilities	4.	4.	4.
5. IEP Process	5.	5.	5.

6. Instructional Materials	6	6.	6.
7. Inservice Training	7.	7.	7.
8. Community Resources	8.	8.	8.
9. Student Progress	9.	9.	9.
10. Communication Within Program	10.	10.	10.
11. Screening	11.	11.	11.
12. Placement	12.	12.	12.
13. Relationships Between IU and Districts	13.	13.	13.

14. Other (specify)	14.	14.	14.
15. Other (specify)	15.	15.	15.
16. Other (specify)	16.	16.	16.

17. Are there any other general thoughts you wish to add for general planning?

THANK YOU FOR YOUR COOPERATION.

APPENDIX P

EXAMPLE OF PROGRAM-WIDE STUDENT PERFORMANCE DATA COLLECTION FROM THE VISION PROGRAM

2. CHILD-ORIENTED DATA TOPICS

It was the intention of this Committee to address as many topics involved in the concept of student progress and the ways in which it can be most appropriately reflected for reporting purposes. In this regard, the Committee began by first considering the current nature of instructional services in the Vision Program. Table 1 summarizes the results of this discussion and the forms a basis for much of what follows in the Committee's recommendations for progress reporting. It was noted by the Committee that, at the present time, all progress relating to the service settings and subtopics contained in Table 1 is reported on the basis of the IEP. In particular, there is a rating of the degree of effort the student puts into the skills, a verbal statement of progress in the form of a type of criterion-referenced measurement, and a description of the major of the goals. It was felt that, until the present time, such progress reporting has served the purposes of this Program well. From this base line of current practice, the Committee began to think about what alternative reporting systems might be used.

The Committee conceived of ongoing progress reporting at two major levels. First, the Committee felt that a form could be devised to help organize intake information that in effect would form a base line for any overall, global progress assessment judgments. The form could also embody such general perceptions of global student progress. Toward this end, this Committee spent a great deal of attention to devising the form that is contained in Appendix B. This form contains three major dimensions of the Program's efforts: student factors, placement factors, and facilitation and ongoing evaluation factors. All three parts of the form that reflect these factors have for the most part open-ended spaces to allow the staff member to insert all relevant base line information. Then, in

TABLE 1

IMPLICATIONS FOR DIFFERENT PROGRESS REPORTING SYSTEM:

TYPES OF VISION PROGRAM SERVICE SETTINGS

1. Self-Contained Classroom

   a. Reading

      (1) Woodcock Reading Mastery Test: pretest at start of year and posttest at end of year

      (2) Bookmark Reading Series--probes that come with it used throughout instruction

   b. Mathematics

      (1) Key Math: pretest at start of year and posttest at end of year

      (2) Harcourt Modern Math Series: locally devised tests used at discretion of teacher

   c. Language: eclectic approach to instruction and to monitoring

   d. Science: eclectic approach to instruction and to monitoring

   e. Spelling: IDM Tapes with self-check devices

   f. Braille: constant monitoring of mastery by teacher

   g. Art: integrated

   h. Music: integrated

   i. Physical Education: integrated

2. Itinerant Services

   a. Direct Services of Instruction (DSI)

      (1) Listening

      (2) Visual Stimulation

      (3) Typing

      (4) Use of Special Materials and Equipment

      (5) Instruction in Specific Skills (e.g., Braille)

      (6) Self-Help Skills (including Socialization)

      (7) Career Education

      (8) Supplementary Instruction in Tool Subjects

      (9) Specific Remediation in Non-Academic Skills

b. Other Itinerant Services

(1) Provide Materials, Books and Equipment

(2) Enlarge Existing Books and Materials

(3) Liaison With Regular Education Teacher

(4) Intake Evaluation of Specific Skills

3. Orientation and Mobility

a. Prerequisite Travel Skills

(1) Vocabulary (100 Concepts)

(2) Direction Systems (clock directions, compass directions)

(3) Body Image

(4) Prerequisite Concepts (e.g., Listening, Localizing)

b. Travel Instruction

(1) School Building Travel

(2) Neighborhood Travel

(3) Residential Travel

(4) Travel to Small Businesses

(5) Travel to Major Businesses

c. Allied Skills

(1) Community Services Usage

(2) Vocational Application Skills

(3) Care Travel Skills (if appropriate)

Part III, the form also allows structured ratings of perceptions of progress and value placed upon Vision Program services by specified individuals. Thus, at this first level of major progress reporting, the Committee sees much value to coming to grips with services that for the most part augment already existing regular education activities and thus are difficult to disentangle for measurement purposes.

A second major level of progress reporting was experimented with by this Committee. It was felt that the Program might be able to make unitized mastery progress report forms based upon the curricular and/or service function subtopics. It was felt that this type of progress reporting would be of a much more specific nature and could in effect become a type of standard progress report it proves successful. Each logical subtopic would be on a separate reporting sheet, and only those subtopic areas that are relevant to a particular student's programming will be used in such progress reporting efforts. To test this concept of a series of separate progress report devices, an example of Direct Services of Instruction was selected, mainly, listing skills. The skills were arranged in as logical a hierarchical progression as the Committee felt was possible. Then a type of criterion-measurment mastery approach was taken in providing spaces for the Vision Program staff member to insert crucial dates. In this regard, the system would be quite simple: only date information is used, and no assessment of exact quantity of learning is necessary for reporting purposes. One can see from Appendix C the results of the Committee's efforts in this area. Of particular note are the columns for inserting date information. The possibilities are status unknown, already mastered, in progress/report period 1, in progress/report period 2, in progress/report period 3, in progress/report period 4, achieved mastery, and needs further instruction. Apart from the date entries that the staff member might wish to use, spaces are allowed for comments on the status of any of these skills on that particular progress form. Such a system of separate but related report forms would allow a cumulative master file of mastery reports for a student's efforts. Committee wanted any of the potential progress reporting methods to not only serve its obvious purpose, but also serve as a vital communication link between the student's current instructors, parents, and other school officials, and with the future instructional staff that might come into contact with this student. The Committee felt this approach would have quite a bit of potential for further exploration.

The Committee concluded its discussions by considering the criteria for expectancies for growth. This is a very complex topic, and to date no individuals within the Intermediate Unit or even nationally have come to a comfortable grip with this issue. The Vision Program felt it had very clear expectancies at a global level for students in its service settings. For instance, for both the orientation mobility services and the itinerant services, the expectancy was to maintain the student in his present regular education setting as much as possible. For the self-contained class setting, the expectancy was to set realistic goals based on current functioning levels and to achieve as much as possible from that point onward. The Committee discussed four more specific ways of setting precise criteria for performance levels: (1) past performance of similarly impaired children in specified subskill areas (historical data); (2) the formula-based procedures (e.g., current levels of functioning plus potential of the child plus

other facotrs); (3) professional judgment of the Vision Program staff member; and (4) task analysis of the subskill area with arbitrary levels of achievement to aim for.

The Committee recommended that some of the above ideas be explored in further work by the Program.

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-8 WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

INDIVIDUAL STUDENT PLANNING AND EVALUATION FORM

Instructions: This form is designed to assist the Vision Program Staff member to organize programming information of three types: student factors, placement factors, and facilitation factors. This form is meant to be used in conjunction with the student's IEP to help manage and evaluate the progress of the student. In the spaces provided, please give a brief description of information relevant to each factor. Wherever possible, please list the source and date of information. Feel free to continue on the reverse side or to attach additional sheets.

PART I: STUDENT FACTORS

A. Severity and Nature of the Visual Impairment: _____

_____

_____

_____

B. Levels of Visual Functioning: _____

_____

_____

_____

C. Levels of Intellectual and Academic Functioning: _____

_____

_____

_____

D. Home Environment: _____

_____

_____

_____

E. Social and Emotional Factors: _____

_____

_____

_____

F. Previous Special Education, Including Use of Materials and Equipment: __

_____

_____

_____

G. Previous Regular Education Experience, Including Use of Materials and Equipment: _____

_____

_____

_____

H. Any Other Student Information You Consider Important: _____

_____

_____

_____

PART II: PLACEMENT FACTORS

A. Regular Education Aspects

1. Learning Expectation: _____

_____

_____

_____

2. Instructional Strategies: _____

_____

_____

_____

3. Modes of Presentation: _____

_____

_____

_____

4. Use of Regular Class Materials and Equipment: _____

_____

_____

_____

B. Use of Special Materials and Equipment: _____

_____

_____

_____

C. Physical Environment: _____

_____

_____

_____

D. Transportation: _____

_____

_____

_____

E. Compatibility: _____

_____

_____

_____

F. Any Other Placement Information You Consider Important: _____

_____

_____

_____

PART III: FACILITATION AND ONGOING EVALUATION FACTORS

A. Purposes of Vision Program Services As Seen By:

1. Regular Education Teacher: _____

_____

_____

_____

2. Parent: _____

_____

_____

_____

3. Student: _____

_____

_____

_____

4. Other (specify: _____): _____

_____

_____

_____

5. Other (specify: _____): _____

_____

_____

_____

B. Your Interpretation of the Part II Student Factors: _____

_____

_____

_____

C. Regular Education Teacher Needs: _____

_____

_____

_____

D. Implications of Overall School Environment: _____

_____

_____

_____

E. Parent Implications and Needs: _____

_____

_____

_____

F. Coordination of All Services: _____

_____

_____

_____

G. Overall Reactions to All Vision Program Services Provided to This Student, As Perceived by Specified Individuals (The "Reaction Before" is filled in by the Therapist for all individuals prior to the start of the current time period of services--usually a school year. The "Reaction After: is filled in by the Therapist as she best judges the attitudes at the end of the current time period of services. The ratings are as follows: 1 = sees minimal value, 2 = sees some value, 3 = sees much value, and 4 = sees great value.)

1. Visually Impaired Student:

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4

Date: __ _____ Date: _____

2. Parent (_____ Mother; _____ Female Guardian)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4

3. Parent (_____Mother; _____Male Guardian)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4
Date: _____				Date: _____			

4. Regular Education Teacher

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4
Date: _____				Date: _____			

5. Peer Students

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4
Date: _____				Date: _____			

6. District Contact Person (_____Principal; _____Guidance Counselor; _____Other: specify: _____)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4
Date: _____				Date: _____			

7. Other IU Staff Working with Student (specify: _____)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4

8. Other (specify: _____)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4
Date: _____				Date: _____			

9. Other (specify: _____)

Reaction Before				Reaction After			
1	2	3	4	1	2	3	4

10. Comments on Overall Reaction to Services: _____

_____

_____

_____

MONTGOMERY COUNTY INTERMEDIATE UNIT
SPECIAL EDUCATION CENTER • 1605-B WEST MAIN ST. • NORRISTOWN, PA. 19401 • 215-539-8550

EVALUATION OF DIRECT SERVICES OF INSTRUCTION (DSI)

AREA: LISTENING SKILLS

(Designed for NCR Paper)

Instructions: For each of the following items, indicate the status of each subskill, whether or not instruction in that subskill is proceeding at present. If you have been unable to determine the status of the student in that particular subskill at the start of this total time period, insert the date of this form's completion as the entry under "Status Unknown." If the student has already mastered that subskill at the start of this total time period, also insert the date of this form's completion as the entry under "Already Mastered." For each successive reporting period, if a subskill is in progress, insert the date of the report period time under "In Progress." If the student masters a subskill at any time throughout this total time period, enter the date under "Achieved Mastery" and make no more entries for such a subskill. If at the end of this total time period, the student has not yet mastered the subskill, insert the date of the end of this total time period under "Needs Further Instruction."

	Status Unknown	Already Mastered	In Progress/ Report Period 1	In Progress/ Report Period 2	In Progress/ Report Period 3	In Progress/ Report Period 4	Achieved Mastery	Needs Further Instruction
1. Localization								
2. Tracking								
3. Identification of Sounds								
4. Discrimination Among Sounds								
5. Oral Comprehension								
a. Follow Directions								
b. Determine Main Idea								
c. Determine Characteristics								
d. Determine Sequence of Events								
e. Determine Major Skills								
f. Summarize Information								
g. Determine Mental Imagery								
h. Predict Outcome								
i. Determine Cause & Effect								
j. Draw Conclusions								
k. Differentiate Fact from Opinion								
l. Utilize Textbook								
m. Develop Outline Skills								

6. Comments on Any of the Above at Start of Total Time Period: _____

7. Comments on Any of the Above for Report Period 1: _____

8. Comments on Any of the Above for Report Period 2: _____

9. Comments on Any of the Above for Report Period 3: _____

10. Comments on Any of the Above for Report Period 4: _____

11. Comments on Any of the Above at End of Total Time Period: _____